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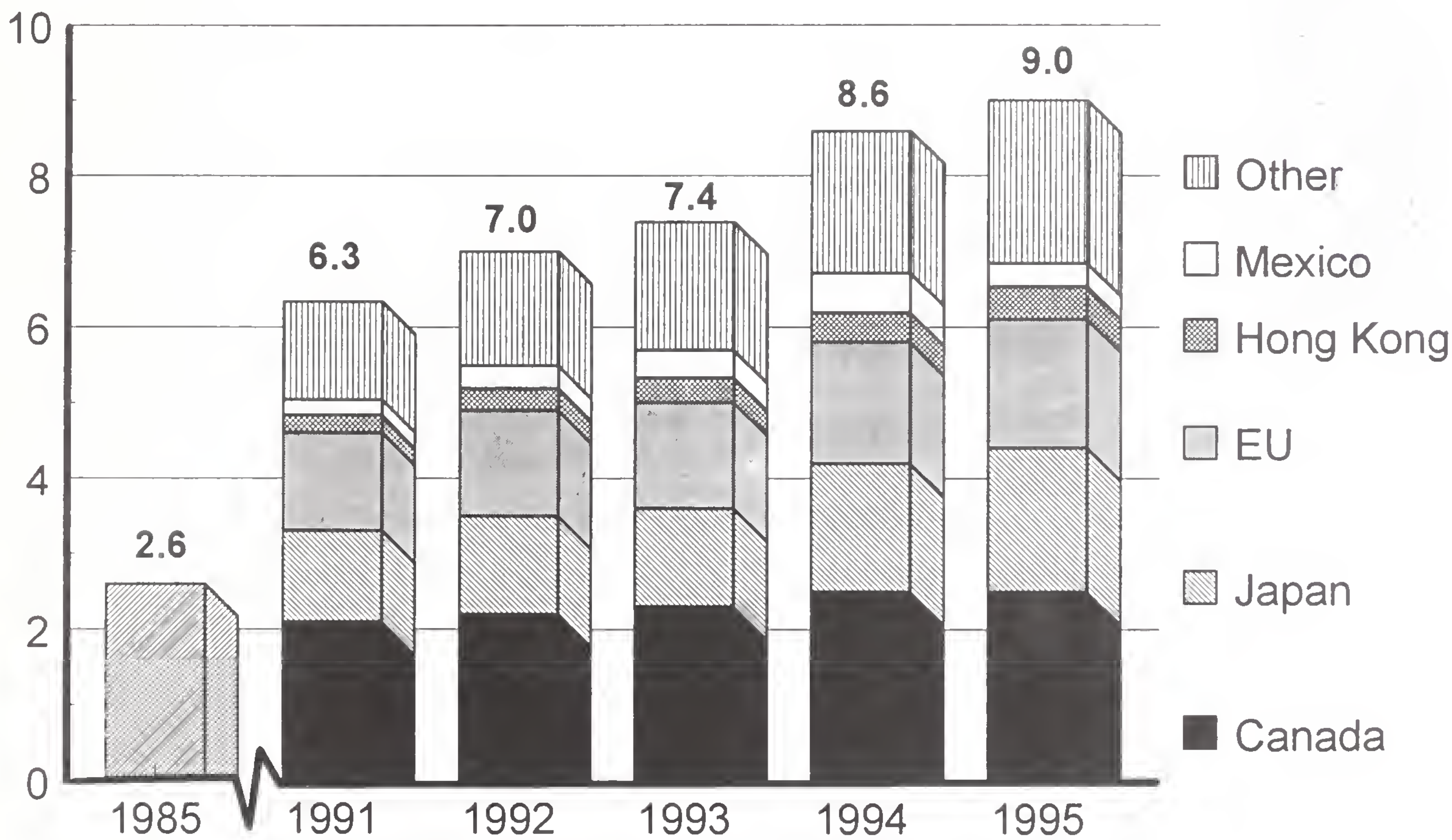
Circular Series
FHORT 3-96
March 1996

World Horticultural Trade & U.S. Export Opportunities

U.S. Horticultural Product Exports Reached Another Record in Calendar Year 1995



Source: U.S. Department of Commerce, Bureau of the Census

U.S. exports of horticultural products in calendar 1995 reached a record $9.0 billion, the eleventh consecutive year of increase. Strong performances in Canada, Japan, and the European Union boosted U.S. horticultural shipments last year. These markets accounted for almost 70 percent of total U.S. horticultural export value in 1995. Major commodities contributing to the export increase included tree nuts ($1.2 billion), fresh vegetables ($985 million), fresh citrus ($715 million), fruit and vegetable juices ($659 million), canned vegetables ($603 million), and dried fruit ($399 million). The implementation of GATT Uruguay Round Agreements, (especially tariff reductions), a general improvement in world economies, and the promotion of U.S. horticultural products under the Market Promotion Program have contributed to the increase in U.S. horticultural product exports. The outlook is for this upward trend to continue in 1996.

Approved by the World Agricultural Outlook Board - USDA

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Laura Davis	202-720-2252	Deciduous fruit
Ted Goldammer	202-720-8498	Wine, brandy, hops, and potatoes
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Stacey Peckins	202-720-5330	Tree nuts, papaya, foliage, plants
Steve Shnitzler	202-720-8495	Dried fruit, avocados, and ginseng

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Export Summary

U.S. exports of horticultural products to all countries in November 1995 totaled $836.7 million, down 1 percent from the same month a year earlier. Eleven out of 15 categories of agricultural exports registered increases. Categories with the most significant increases in November were tree nuts (up $17 million or 13 percent), noncitrus fresh fruit (up $13.2 million or 12 percent), fruit and vegetable juices (up $11.7 million or 29 percent) and wine (up $6.0 million or 37 percent). Fresh vegetables registered the sharpest deoline (down $22.4 million or 23 percent).

All measures not otherwise noted are metric. One kilogram (kg.) = 2.2046 pounds, 1 metric ton = 2,204.62 pounds, 1 liter = 0.2642 gallon, 1 hectoliter (hl.) = 26.42 gallons, and 1 hectare (ha.) = 2.471 acres.

U.S. EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
NOV 95

NAME	QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY	CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FR, FRUIT CITRUS MT										
GRAPEFRUIT	40,132	54,738	74,965	90,641	481,742	21,390	28,447	37,910	48,085	239,515
LEMONS	11,052	10,733	20,958	21,067	126,120	9,741	10,079	21,933	23,359	120,392
ORANGES, INCL TMPLS	35,861	23,656	56,725	39,880	580,755	19,985	15,188	29,774	24,593	324,139
OTHER CITRUS	4,311	3,772	6,136	5,623	24,297	3,750	3,079	5,364	4,586	20,789
Subtotal:----	91,358	92,900	158,785	157,213	1,212,916	54,867	56,794	94,983	100,624	704,836
FR, FRT, NON-CIT MT										
APPLES	82,253	72,921	163,259	131,444	663,048	44,843	45,290	90,935	82,587	405,155
AVOCADOS	529	1,026	1,203	2,590	12,489	497	733	1,048	1,827	13,228
CHERRIES SWT & TRT	64	933	195	1,739	30,268	58	735	148	1,436	139,775
GRAPES	30,244	36,265	75,622	78,800	204,786	39,677	48,979	92,657	98,152	250,677
KIWIFRUIT	1,120	451	1,504	626	9,505	1,251	606	1,743	871	13,084
MELONS	5,604	7,063	15,759	16,267	212,881	3,123	3,683	7,498	8,097	85,470
PAPAYA	847	640	1,566	1,347	8,260	1,601	1,454	2,912	2,872	18,107
PEACHES & NCTRNS	162	96	2,469	1,132	68,235	159	85	1,670	949	63,671
PEARS	22,859	28,195	45,188	49,405	127,960	11,123	13,682	22,506	25,549	71,527
PLUMS/PRUNES	429	98	3,543	1,758	40,431	301	113	2,939	1,829	48,372
STRAWBERRIES	1,367	1,600	5,009	6,175	49,320	4,887	5,134	14,492	14,804	86,629
OTHER NON-CITRUS	4,026	5,152	9,719	10,983	48,272	4,187	4,367	10,285	11,144	60,322
Subtotal:----	149,509	154,445	325,041	302,272	1,475,462	111,710	124,866	248,839	250,122	1,256,023
CND/PREP FRUIT MT										
CHERRIES TRT CND	306	685	1,019	1,564	8,722	464	874	1,477	1,927	11,490
FRUIT MIXTURES	3,937	3,267	6,345	6,340	28,885	4,447	3,740	7,184	7,261	34,317
MARACHINO CHRY	460	2,194	940	2,517	4,917	998	2,516	2,040	3,147	10,196
PEACHES CANNED	1,071	1,774	2,846	3,635	20,915	1,032	1,599	2,659	3,289	19,087
PINEAPPLE CANNED	297	239	614	615	3,833	272	199	511	520	3,445
FRT PREP/PRES	5,701	5,761	12,258	11,783	77,143	6,761	7,181	15,087	14,521	89,360
OTHER CANNED FR	2,098	3,356	4,842	6,572	41,246	2,285	3,140	5,097	6,771	38,673
Subtotal:----	13,872	17,279	28,868	33,029	185,663	16,263	19,252	34,057	37,439	206,571
DRIED FRUIT MT										
PRUNES, DRIED	6,104	4,473	13,052	12,402	60,237	14,342	10,368	30,728	28,381	142,075
RAISINS, DRIED	11,278	9,404	24,783	23,075	122,132	18,479	16,543	40,216	39,519	196,097
OTHER DRIED FRUIT	2,702	3,331	6,158	6,211	32,032	6,621	6,577	14,059	14,108	62,303
Subtotal:----	20,085	17,209	43,993	41,689	214,402	39,443	33,489	85,004	82,009	400,476
FROZEN FRUIT MT										
BLUEBERRIES, FZN	421	1,013	823	1,951	7,742	634	1,548	1,177	3,029	11,597
STRAWBERRIES, FZN	1,728	2,129	4,963	3,198	25,729	2,172	2,767	6,343	4,193	33,529
OTHER FZN FRUIT	1,063	2,764	2,544	6,026	19,310	1,596	2,838	3,871	6,861	27,829
Subtotal:----	3,213	5,907	8,331	11,176	52,782	4,402	7,154	11,392	14,083	72,956
FRT&VEG JUICE (SSE) KL										
GRAPEFRUIT JU CNC	2,711	3,014	7,125	6,029	55,965	2,460	2,235	5,462	4,471	41,668
ORANGE JU NT CNC	12,329	9,300	25,007	20,409	156,960	8,249	6,869	16,611	15,025	105,564
ORANGE JUICE CNC	14,941	15,225	29,302	34,843	284,382	9,062	9,807	18,310	20,476	165,312
OTHER JUICES	29,254	53,388	63,643	102,010	426,297	20,936	33,524	45,619	65,782	317,333
Subtotal:----	59,237	80,927	125,079	163,293	923,605	40,708	52,437	86,003	105,756	629,879
VEGETABLES FR MT										
ASPARAGUS, FR, CHLD	124	133	271	252	18,543	416	315	939	628	66,817
BROCCOLI	6,379	9,264	11,669	17,466	116,621	6,523	5,027	10,753	10,484	91,261
CAULIFLOWER	7,439	9,383	14,472	16,803	99,327	5,827	5,619	10,643	10,227	73,676
CELERY	10,698	10,270	17,943	17,375	111,149	4,402	3,944	7,038	6,759	57,180
LETTUCE, FR, CH.	26,473	25,836	51,340	49,455	275,794	16,373	10,001	31,389	21,139	184,043
ONIONS, FR	49,756	29,325	106,251	52,076	311,266	15,725	8,548	31,391	14,809	105,026
PEPPERS	5,755	4,256	9,889	8,785	50,146	5,414	3,875	9,181	7,172	48,726
TOMATOES, FR, CH.	14,017	10,388	29,373	22,724	139,476	12,208	9,283	23,146	17,782	109,687
OTHER VEG, FR.	50,578	42,704	101,719	84,365	726,644	30,742	28,578	62,317	58,208	400,143
Subtotal:----	171,223	141,561	342,930	269,306	1,848,970	97,634	75,194	186,802	147,213	1,136,564
VEGETABLES CANNED MT										
CATSUP & CHILI SA	3,121	3,450	7,634	6,861	40,411	2,195	2,603	5,264	5,106	29,801
SWEET CORN CANNED	15,802	14,190	28,895	27,427	165,152	13,637	11,189	24,989	21,548	138,094
TOMATO PASTE	7,425	9,738	16,879	22,057	86,613	6,206	6,787	13,561	16,714	71,448
TOMATO SAUCE	7,425	5,728	13,210	13,174	79,204	6,823	5,337	12,470	12,804	77,615
OTHER CANNED VEG.	18,594	21,896	39,887	41,397	234,435	22,622	27,069	47,806	52,174	281,163
Subtotal:----	52,368	55,003	106,507	110,918	605,818	51,485	52,987	104,093	108,349	598,123
FROZEN VEGETABLES MT										
FROZEN FRENCH FRY	26,054	29,040	48,256	55,890	353,130	18,863	21,510	35,095	41,385	260,204
FZN SWT CORN	6,627	5,550	14,259	11,762	65,341	6,126	4,806	12,851	9,921	57,477
OTHER POT. FZN	1,630	1,595	3,346	3,287	25,302	1,471	1,331	3,042	2,634	20,454
OTHER FZN VEG	5,557	6,704	11,183	12,897	69,838	4,738	6,365	9,935	12,217	63,108
Subtotal:----	39,869	42,889	77,045	83,839	513,613	31,199	34,013	60,924	66,158	401,245
DEHYD VEGETABLES MT										
GARLIC DEHY	724	644	1,564	1,412	7,831	1,619	1,460	3,686	3,274	18,414
ONIONS DEHY	2,863	2,418	9,384	5,089	33,871	5,983	5,574	14,294	12,129	70,932
POTATO DEHYD	3,526	5,121	8,145	9,112	58,542	3,705	4,902	8,743	9,082	58,976
OTHER DEHY VEG.	4,673	4,687	9,521	8,932	42,790	8,036	6,500	15,442	13,048	67,418
Subtotal:----	11,787	12,871	28,615	24,547	143,037	19,344	18,438	42,166	37,534	215,741
TREE NUTS MT										
ALMND SH/PREP	19,250	24,116	50,321	58,228	214,014	63,521	60,676	160,795	151,299	724,459
ALMONDS, UNSHLD	1,765	2,645	3,887	5,196	17,885	4,508	6,874	9,537	13,176	45,292
PISTACHIO, UNSHLD	1,764	1,777	3,417	3,466	11,788	5,075	6,159	9,425	11,728	34,698
WALNUTS, SHLD	4,705	3,796	8,479	5,913	21,816	10,824	11,120	20,449	17,479	65,227
WALNUTS, UNSHLD	14,227	17,127	42,765	49,155	50,659	22,705	33,169	67,760	94,852	82,970
OTHER NUTS	9,069	9,351	16,447	21,494	58,762	21,339	27,232	39,309	55,932	162,713
Subtotal:----	50,783	58,815	125,317	143,455	374,926	127,974	145,232	307,277	344,467	1,115,362
NURSERY PRODUCTS NONE										
CUT FLOWERS	0	0	0	0	0	2,594	3,390	5,729	7,103	38,518
OTHER NURSERY	0	0	0	0	0	14,288	14,460	27,149	26,909	157,642
Subtotal:----	0	0	0	0	0	16,883	17,851	32,878	34,013	196,161
HOPS & PRODUCTS MT										
HOP EXTRACT	390	432	849	662	4,394	7,767	7,703	14,608	11,522	70,104
HOP PELLETS	719	681	1,221	1,128	6,822	4,017	3,595	6,988	5,936	39,412
HOPS, NSFP	230	314	675	1,009	2,854	1,328	1,817	3,660	5,060	17,720
Subtotal:----	1,339	1,428	2,746	2,800	14,070	13,114	13,116	25,258	22,520	127,237
WINE KL										
GRAPE WINES	9,324	11,040	21,785	24,087	123,669	14,939	20,686	34,441	44,101	200,972
OTHER WINE PRODUCTS	1,142	1,426	2,598	2,649	12,519	1,234	1,519	2,705	2,880	15,044
Subtotal:----	10,466	12,466	24,384	26,737	136,188	16,173	22,206	37,147	46,982	216,017
MISCELLANEOUS KL										
BEER & BEVERAGES	69,238	70,070	126,172	144,815	834,125	39,937	43,037	75,062	87,401	508,824
EDIBLE PREPARATIONS	19,059	16,299	35,488	33,907	194,915	96,874	58,581	154,153	116,965	801,362
GINSENG	253	215	554	539	908	17,379	21,027	34,858	48,940	65,652
POTATO CHIPS	10,823	5,575	18,207	11,356	69,692	29,702	16,262	50,275	32,467	190,478
OTHER MISC.	0	0	0	0	0	21,081	24,792	47,548	53,491	264,936
Subtotal:----	99,374	92,161	180,422	190,619	1,099,641	204,975	163,700	361,899	339,266	1,831,255
Grand Total:						846,181	836,736	1,718,729	1,736,541	9,108,450

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD TOTAL, OCTOBER-SEPTEMBER YEAR
NOV 95

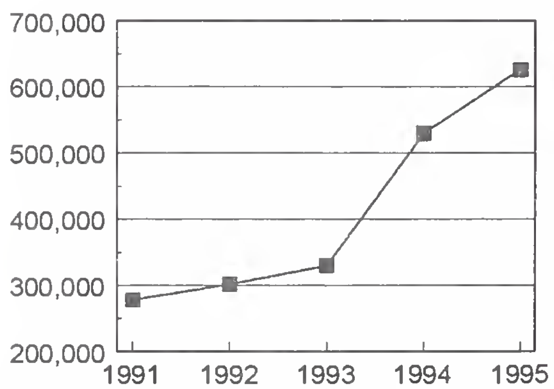
NAME		QUANTITY					VALUE (1,000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		7,380	9,691	17,265	27,694	142,315	2,269	3,873	4,863	8,903	95,959
AVOCADO		7,959	5,273	12,955	13,699	18,869	8,940	4,461	14,440	12,182	17,636
BANANA		295,780	293,252	639,583	623,306	3,673,712	78,836	82,492	170,345	176,867	1,052,675
CANTELOUPE		23,102	18,267	25,423	20,641	274,960	6,770	5,691	7,476	6,470	81,334
GRAPE		1,175	274	1,271	548	363,687	1,119	407	1,199	777	305,123
KIWIFRUIT		83	442	143	1,011	36,557	66	408	121	985	21,709
MANGO		1,668	2,126	2,532	2,871	142,045	2,267	3,040	3,401	4,102	120,810
PEACH		497	168	497	176	49,504	389	184	389	190	31,822
PEAR		550	729	890	1,102	48,064	1,823	2,223	2,947	3,485	26,363
PINEAPPLE		8,586	10,461	19,657	19,951	124,861	3,348	3,559	6,619	6,855	42,735
STRAWBERRY		670	674	706	688	26,775	1,431	1,475	1,501	1,515	45,952
OTHER MELON		13,364	20,016	18,361	27,141	262,325	3,738	5,180	5,584	7,425	86,115
OTHER FRUIT		39,503	41,568	98,750	98,683	517,083	17,905	17,163	44,284	43,601	228,312
Subtotal:----		400,321	402,948	838,039	837,517	5,680,764	128,908	130,161	263,175	273,365	2,156,551
DRIED FRUIT	MT										
DRD APRICOT		1,484	2,423	2,745	3,513	14,219	2,224	5,257	4,143	7,514	23,594
DRD FIG & PASTE		1,726	944	2,566	1,606	12,257	2,220	1,502	3,905	3,106	14,525
OTHER DRD FRUIT		2,525	2,570	4,583	4,826	21,971	3,389	3,536	6,321	6,728	31,441
Subtotal:----		5,735	5,937	9,896	9,946	48,448	7,834	10,296	14,369	17,350	69,561
FROZEN FRUIT	MT										
FZN BLUEBERRIES		1,047	813	1,870	1,738	8,364	1,377	1,013	2,408	2,112	11,187
FZN STR		211	511	318	660	26,585	298	365	445	615	26,548
OTHER FZN FRUIT		1,335	1,634	2,629	3,464	24,786	1,420	1,965	2,721	4,104	27,293
Subtotal:----		2,594	2,960	4,817	5,863	59,736	3,096	3,345	5,574	6,833	65,030
CANNED/PREP FRUIT	MT										
CANNED OLIVES		4,984	5,968	10,959	12,054	64,089	12,439	16,457	25,941	34,009	163,721
CANNED ORANGES		2,765	1,624	6,772	2,941	50,983	2,083	1,802	5,322	3,190	47,960
CANNED PEACH		2,482	1,480	4,332	3,361	18,166	1,433	1,014	2,470	2,290	10,779
CANNED PINEAPPLE		25,234	26,938	50,077	55,539	298,079	12,211	14,584	23,426	30,174	151,203
MIXED FRUIT		3,307	3,646	6,065	5,667	37,535	2,391	3,238	4,606	5,227	30,492
PREP/PRES FRUIT		5,595	5,318	13,019	11,046	70,887	7,018	7,487	16,494	16,251	90,999
OTHER CANNED FRUIT		4,504	5,691	8,378	11,268	60,419	6,080	6,763	10,796	13,814	78,013
Subtotal:----		48,875	50,669	99,604	101,879	600,161	43,658	51,348	89,058	104,958	573,170
FRT&VEG JUICE (SSE)	KL										
APPLE JUICE		94,987	57,918	170,262	119,716	929,629	19,778	24,547	33,776	46,365	256,927
FCOJ		146,998	91,835	282,117	122,155	885,508	25,543	21,436	48,701	28,475	182,623
GRAPE JU		3,747	13,077	9,249	27,053	62,747	1,235	3,692	3,068	7,332	20,428
PINAP JU		18,239	27,049	39,409	50,936	299,527	3,604	5,819	7,582	10,346	63,778
OTHER FRUIT JUICES		19,209	9,751	38,426	24,203	247,679	9,685	8,056	19,627	16,435	111,099
Subtotal:----		283,181	199,632	539,465	344,064	2,425,093	59,847	63,550	112,756	108,954	634,855
FRESH VEGETABLES	MT										
GARLIC		401	456	989	990	22,685	615	543	1,388	1,103	29,250
ASPARAGUS		3,177	3,462	6,123	6,769	34,631	4,450	5,975	8,422	11,137	55,663
BELL PEPPER		4,705	9,099	8,149	13,738	131,363	9,300	10,288	13,801	15,231	177,121
CARROTS		13,585	14,512	24,993	26,659	101,168	3,268	3,365	6,000	6,443	27,064
CHILI PEPPER		4,281	5,873	6,285	14,805	79,553	4,866	4,349	6,463	8,017	67,491
CUCUMBER		21,401	32,178	24,518	38,573	237,483	9,094	8,076	10,769	9,878	127,518
ONIONS		12,046	11,855	18,636	18,023	216,043	12,975	16,635	17,606	22,395	129,063
POTATO, INCL SO		19,521	40,236	33,908	77,214	246,481	4,134	8,164	6,961	14,788	44,505
SQUASH		11,479	15,729	14,920	22,229	111,486	7,666	4,928	10,123	7,571	83,567
TOMATOES		13,902	33,756	28,880	63,494	559,771	12,639	21,956	23,521	40,662	406,067
OTHER FRESH VEGETAB		25,678	33,088	50,435	58,940	396,143	15,218	18,636	27,099	32,449	240,702
Subtotal:----		130,179	200,250	217,841	341,438	2,136,811	84,230	102,921	132,159	169,680	1,388,016
CANNED/DEHYD VEGET	MT										
CND ARTICHOKE		1,033	1,962	2,066	4,027	20,901	2,022	3,669	4,010	7,660	37,731
CANNED BAMBOO		2,747	3,372	5,885	8,424	27,340	2,050	3,304	4,370	8,089	23,198
CND MSHROOMS		4,266	3,879	8,472	7,792	71,765	11,322	9,002	21,640	18,473	167,112
CND PIMIENTO		978	678	1,637	1,200	8,580	1,403	964	2,351	1,666	11,639
CND TOM		3,483	3,734	6,945	9,055	56,988	1,224	1,762	2,436	4,015	23,520
CANNED WATERCHESTNU		2,047	1,119	4,106	2,332	33,353	1,650	764	3,301	1,710	23,904
TOMATO PASTE & SAUC		3,120	1,983	6,269	6,438	50,443	2,258	2,137	4,481	5,611	42,627
DRIED MUSHROOMS		108	103	253	183	2,352	1,232	1,422	3,115	2,577	22,432
DRIED TOMATOES		559	507	945	1,016	5,587	2,092	1,879	3,628	3,830	21,544
OTHER DEHYD VEGETAB		10,826	8,208	17,023	18,750	107,852	9,359	8,455	16,581	18,171	102,769
OTHER CANNED VEGETA		16,139	17,130	31,778	34,883	210,672	16,364	16,932	32,144	34,000	197,700
Subtotal:----		45,312	42,681	85,384	94,105	595,839	50,983	50,295	98,063	105,808	674,181
FROZEN VEGETABLES	MT										
BROCCOLI FZN		12,718	17,904	25,580	33,175	169,617	8,129	10,207	16,222	19,148	101,122
CAULIFLOWER FZN		4,984	3,177	8,894	5,890	24,473	2,961	1,820	5,633	3,563	15,663
POTATO FZN		14,436	13,624	26,805	27,649	159,056	8,382	8,167	15,204	16,803	96,764
OTHER VEG FZN		10,595	10,584	34,811	45,272	219,639	8,251	8,447	17,268	17,360	98,674
Subtotal:----		42,735	45,290	96,091	111,987	572,785	27,725	28,643	54,329	56,876	312,224
TREE NUTS	MT										
BRAZILS TOT		1,025	385	1,521	762	10,643	2,499	989	3,736	2,005	19,939
CASHEWS TOT		4,276	4,359	9,581	9,064	55,278	19,309	21,910	42,366	45,503	243,521
COCONUT		5,310	5,726	10,925	11,726	58,370	4,212	4,636	8,745	9,480	47,599
PECANS		6,472	4,981	8,621	7,026	25,275	13,983	9,105	18,435	13,601	72,806
OTHER NUTS		3,796	3,467	6,156	5,558	22,594	12,824	10,974	21,898	19,016	88,436
Subtotal:----		20,881	18,920	36,806	34,139	172,163	52,829	47,616	95,182	89,606	472,303
NURSERY PRODUCTS	M										
CARNATIONS		100,909	111,479	179,649	205,983	1,149,989	8,462	10,756	14,900	19,295	107,806
CHRISTMAS TREES		1,562	1,628	1,563	1,633	2,013	13,341	14,356	13,349	14,371	17,268
CHRYSANTHEMUMS		49,547	66,409	98,073	122,897	616,201	5,749	7,204	11,025	13,669	71,869
ROSES		47,185	54,546	100,580	117,133	750,511	8,051	10,387	17,011	21,776	143,513
TULIP BULBS		10,652	11,887	73,426	78,767	321,236	1,271	1,368	9,036	10,543	40,542
OTHER CUT FLOWERS		0	0	0	0	0	10,887	11,993	21,014	23,961	149,908
OTHER NURSERY PRODU		0	0	0	0	0	22,272	24,649	47,750	53,133	272,053
Subtotal:----		209,857	245,950	453,293	526,414	2,839,951	70,035	80,716	134,087	156,752	802,962
HOPS & PRODUCTS	MT										
HOPS & PELLETS		194	332	309	369	5,190	1,030	2,231	1,382	2,376	34,466
OTHER HOP PRODS		1	1	1	1	555	6	19	6	38	3,403
Subtotal:----		196	333	310	370	5,746	1,037	2,250	1,388	2,414	37,870
WINE	KL										
RED WINE		13,178	13,546	25,062	27,310	125,483	49,285	55,180	90,917	112,363	453,968
SPARKLING WINE		5,145	5,337	10,821	12,346	29,393	41,599	48,645	91,582	117,149	266,227
WHITE WINE		9,477	10,073	20,258	21,909	94,579	32,169	33,279	66,856	74,162	303,476
OTHER WINE PRODUCTS		0	0	0	0	0	7,385	6,882	16,973	17,186	75,048
Subtotal:----		27,801	28,957	56,142	61,565	249,456	130,439	143,987	266,330	320,862	1,098,720
MISCELLANEOUS	KL										
BEER & BEVERAGES		111,525	126,289	208,717	254,494	1,379,486	93,745	111,588	176,377	223,151	1,161,364
OTHER MISC.		0	0	0	0	0	71,990	78,103	138,363	158,784	857,539
Subtotal:----		111,525	126,289	208,717	254,494	1,379,486	165,736	189,692	314,741	381,936	2,018,903
Grand Total:							826,361	904,826	1,581,217	1,795,399	10,304,353

EXPORT NEWS AND OPPORTUNITIES

United States beer exports are soaring to new levels

United States beer exports continue to reach record levels. United States beer exports increased by 60 percent in 1994. In 1995, January-November, U.S. beer exports have already exceeded calendar year 1994 exports in volume by 18 percent. Exports to date in 1995 were valued at over $388 million. Several factors have contributed to the increase. A very important factor has been the saturation of the U.S. beer market. Brewing companies must now either compete in a tight domestic market or search for new customers overseas. According to industry sources, many companies in recent years have chosen to set up operations abroad. This has included bigger promotional campaigns and an increasing number of joint ventures in promising markets, especially in China.

U.S. Exports of Beer 1991-1995
Calendar Years
Thousand Liters



Source: U.S. Bureau of the Census

A second factor that has encouraged this movement has been the rapidly growing economies and rising incomes in former Third World countries, especially in Asia. As these economies have developed, their taste for and ability to purchase foreign products has increased. In addition, trade agreements like The Uruguay Round, NAFTA and bi-lateral negotiations, have helped reduce barriers to trade in countries where trade opportunities had been limited. For example, Taiwan recently lifted a 50 year old ban on all imported beer. Between 1994 and 1995, U.S. exports to Taiwan rose by 106 percent and made Taiwan the third largest U.S. export market for beer.

The largest and fastest growing markets in recent years have been in Asia. Japan is the largest U.S. export market for beer. In 1995 (January to November) over 28 percent of U.S. beer exports went to Japan, valued at $123 million. High prices combined with a lower U.S. dollar made Japan a very attractive market. In Hong Kong, the second largest overseas market, exports were up 57 percent from 1994 to 1995.

In Latin America, Brazil, the fourth largest market by volume, led the way for U.S. beer exports which increased by over 300 percent between 1993 and 1994. Exports continued to increase by 134 percent between 1994 and 1995 and were valued at over $33 million. Recent joint ventures of American companies in Brazil significantly contributed to the increase. Panama, Paraguay, and Argentina are also growing Latin American markets for U.S. beer. In addition, the implementation of NAFTA has contributed to increased beer exports to Canada and Mexico. Other growing markets for U.S. beer include the United Kingdom, Ireland, and Russia.

GSM-102 credit guarantee program coverage expanded: frozen orange juice concentrate to Slovakia and fresh apples to the Czech Republic

Table 1 (below) lists registrations in FY 1996 through February 2 for various horticultural commodities and products. On January 29, 1996 the GSM program made two new products for Horticultural products eligible for 102 credits. The inclusion of frozen orange juice concentrate to Slovakia and fresh apples to the Czech Republic are within the basket $10 million lines already established for each of

FY 1996 GSM-102 Credit Guarantee Coverage 1/

Country/Commodity	Announced Allocations FY 1996 ($1,000)	Exporter Applications Approved FY 1996 ($1,000)	Balance ($1,000)
China	100,000	0	100,000
Potatoes 2/	0	0	0
Hops and Products	0	0	0
India	15,000	0	15,000
Treenuts 3/	0	0	0
Indonesia	160,000	35,700	124,300
Potatoes 2/	0	0	0
Tree nuts 4/	0	0	0
Fresh fruit 19/	0	0	0
Raisins and dates	0	0	0
Papua New Guinea 5/	1,000	0	1,000
Canned Vegetables	0	0	0
Czech Republic	10,000	0	10,000
Potatoes 6/	0	0	0
Apples	0	0	0
Slovakia	10,000	0	10,000
Frozen Concentrated Orange Juice	0	0	0
Poland 5/	25,000	0	25,000
Potatoes 2/	0	0	0
Russia 5/	50,000	28,000	22,000
Canned or Frozen Vegetables 7/	0	0	0
Fresh Fruits 8/	0	0	0
Frozen Concentrated Orange Juice	0	300	0
Almonds	0	0	0
Potatoes	0	0	0
Potato Flakes	0	0	0
Egypt 9/	102,000	88,400	13,600
Potatoes 6/	0	0	0
Tunisia	75,000	15,700	59,300
Almonds/Walnuts	0	0	0
Raisins	0	0	0
Southern Africa Region 10/	50,000	4,200	45,800
Tree nuts 4/	0	0	0
Potatoes 2/	0	0	0
East Caribbean Region 11/	50,000	30,700	19,300
Fresh fruit 12/	0	0	0
Mexico 13/	700,000	657,700	42,300
Almonds	0	0	0
Fresh Fruits 14/	0	0	0
Hops and Products	0	0	0
Potatoes 6/	0	220	0
Andean Region 15/	200,000	95,800	104,200
Tree Nuts and Fresh Fruits 16/	0	0	0
Central America Region 17/	40,000	24,300	15,700
Potatoes 6/	0	0	0
Argentina	20,000	0	0
Potatoes	0	0	0
Brazil	150,000	31,500	118,500
Fresh Fruit 18/	0	0	0
Potatoes 6/	0	0	0

1/ Coverage announced for FY 1996 as of February 2, 1996 as detailed in FAS Program Announcements (tel: 202-690-1621 for information); unless otherwise noted, terms are FOB, 90-days to 3 years. 2/ Cut and frozen for french fries, and potato flakes. 3/ Walnuts, pistachios, almonds. 4/ Almonds, walnuts. 5/ Terms are 90 days to one year; for 1-yr terms for Russia, principal repayments plus accrued interest are due at 6-month intervals; C&F coverage also available to point of first ocean discharge for non-Russian flag carriers (see Program Announcement for details). 6/ Cut and frozen for french fries. 7/ Canned or frozen (corn, peas, mixed vegetables, tomatoes, green beans, and spinach). 8/ Apples, oranges, tangerines, lemons, and pears. 9/ Egypt program (90-day to one year terms) authorized at $160-million level for FY96, details for remaining $60 million will be issued later. 10/ Angola, Botswana, Burundi, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Seychelles, South Africa, Swaziland, Tanzania, Uganda, Zaire, Zambia, Zimbabwe. 11/ Barbados, Grenada, Guyana, St. Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago; $70 million authorized for FY96, details of remaining $20 million will be issued later. 12/ Apples, grapes, pears, plums, and peaches. 13/ Mexico's terms are 90 days to 2 years; $1.25 billion authorized for FY96, details for remaining $550 million will be issued later. 14/ Apples, pears, plums, peaches, nectarines, kiwifruit, and strawberries. 15/ Includes Bolivia, Colombia, Ecuador, Chile, Peru, and Venezuela; $350 million authorized for FY96, details for remaining $150 million will be issued later. 16/ Almonds, walnuts, pistachios, pecans, and hazelnuts; apples, pears, plums, peaches, nectarines, and strawberries. 17/ Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama; $60 million authorized for FY96, details for remaining $20 million will be issued later. 18/ Apples; Brazil coverage is for one-year terms; the FY96 authorization is for $255 million, details of the remaining $105 million will be issued later. 19/ Fresh fruit including apples, grapes, oranges, pears, plums, prunes, cherries, and lemons.

those countries. All other terms and conditions previously announced for these lines remain the same. Under the GSM-102 credit guarantee program, repayment terms are usually three years. For example, through this program, the U.S. exporter can be paid by the U.S. bank immediately upon export if an irrevocable letter of credit is opened by the importer's bank and financed by the U.S. bank. The importer's bank then has up to three years to repay the U.S. bank. The following table presents FY 1996 allocations by country by commodity and product. A distinctive feature of the FY 1996 GSM-102 is the move toward more "commodity basket" programs, i.e., one country allocation under which are listed several commodities and products that may be registered on a first-come, first-served basis. This structure provides more flexibility to exporters in registering different sizes of shipments under the program. Repayment terms vary under the program, from the standard 3-year to 90-day terms. For details on terms and authorizations see the footnotes to the table. Note: applications to include other horticultural commodities and products in GSM-102 programs will be considered by FAS. (For further information on the GSM-102 program for horticultural commodities, contact Robert Knapp, 202-720-6877.)

While Brazil's 1995 orange juice production estimate has been increased, exports have been revised down

The Sao Paulo orange production estimate for MY 1995/96 has been increased from 340 to 345 million boxes (40.8 kilos), due to higher than expected fruit production from the off-season bloom, and improved fruit development after rains in late November-December 1995. Sao Paulo's oranges for processing estimate for MY 1995/96 has correspondingly been increased from 235 to 240 million boxes. Brazil's total orange juice production estimate for 1995 (Brazilian marketing year 1995/96) has been increased to 996,000 tons (65 degrees brix). The higher estimate is based on increased orange production and processing estimates for the Sao Paulo commercial orange area. Orange juice extraction rates in Sao Paulo are revised down from 4.13 to 4.08 kilograms of FCOJ (65 degrees brix) per box due to excessive rains in late 1995 and early 1996. Extraction rates reached a record 4.50 kilograms per box in 1994/95, the result of the 1994 drought. No changes are foreseen in orange juice production in other states.

On the other hand, the MY 1995/96 total Brazil orange juice export forecast has been decreased from 986,000 to 966,000 tons. Lower than expected shipments from the state of Sao Paulo to countries in Asia more than offset increased export prospects to the European Union. The MY 1995/96 Brazilian FCOJ ending stocks are estimated to increase to 163,000 tons, due to higher FCOJ production, the late crop and lower orange juice exports from the Sao Paulo area.

WORLD TRADE SITUATION AND POLICY UPDATES

The United Kingdom reduced the tariff on imports of Valencia oranges under its tariff rate quota

On January 11, 1996 the European Union established a 12,000 metric ton reduced tariff rate quota (TRQ) for the importation of Valencia oranges into the United Kingdom, destined for the small premium freshly squeezed juice market. The reference price used to determine the quota import charges was reduced by 10 ECU per 100 kilograms of fruit. The reduced TRQ is retroactive to December 1, 1995 and will expire on March 31, 1996. British processors are continuing to press for a permanent extension of the special TRQ. The British premium freshly squeezed orange juice market amounts to about $18.5 million annually, out of a total $1.2 billion juice market.

Technical talks with Japan yield some progress on U.S. horticultural issues

Meetings between U.S. and Japanese quarantine officials February 6-8 in Tokyo produced favorable results in several areas. On the longstanding issue of access for U.S. fresh tomatoes, a product which the industry believes has a potential market in Japan exceeding $100 million annually, MAFF proposed several options for resolving the issue, one of which is believed to hold promise. The matter is now being closely studied by USDA and industry officials. MAFF officials agreed to modify the existing export protocol for sweet cherries by placing more of the responsibility for carrying out on-site activities on U.S. officials, thereby reducing the required number of Japan inspectors. This action is expected to result in substantial cost savings to the industry.

However, with respect to the important issue of access for U.S. apples, the two sides could not agree on modifications to the existing export protocol. The industry considers many of the current requirements to be financially onerous and lacking a sound scientific justification.

Brazil to ease phytosanitary import requirements for U.S. pears and citrus

Brazil agreed to relax its technical import requirements on pears and citrus during meetings February 7-8 between APHIS officials and their Brazilian counterparts. For a number of other U.S. horticultural products, such as apples and grapes, both sides agreed to continue to exchange technical information. In June 1996, Brazilian and USDA officials will meet again to continue discussing possible modifications to Brazil's import requirements, which were enacted in March 1995.

For pears, the leading U.S. fruit now exported to Brazil, Brazilian officials agreed to accept the use of an industry-proposed fungicide as an alternative to chlorine as a treatment against fire blight, Brazil's key quarantine concern. They also agreed to remove the lengthy cold treatment requirement, thus removing delays to shipping U.S. pears during the vital early months of the marketing season. For citrus, Brazil agreed to accept Florida's systems approach for controlling Caribbean fruit fly, a significant step development in gaining access to the market.

Over the last 2 years Brazil has emerged as an important new market for U.S. fresh fruits. During the 5 month period July-November 1995, exports of fresh deciduous fruit exceeded $14 million, almost equaling the $15 million shipped during all of 1994/95. Pears, apples, and grapes are the leading commodities in value. Brazil has become the top export market for U.S. pears this season, with volume up 136 percent compared with last year.

The Philippines has implemented lower import tariffs for a range of U.S. horticultural commodities

Effective January 15, 1996, the Philippines enacted a new 5 year tariff reform program under Executive Order 288 which immediately lowered, by 20 to 40 percent, import duties on agricultural commodities including horticultural commodities.

The tariff reductions will be completed by January 1, 2000. This action is positive news for continued growth in U.S. exports of horticultural products to the Philippines, which totaled $45 million in calendar year 1994, up from $29 million the previous year. Exports in 1994 were valued at $10 million for grapes, $8 million for apples, $7 million for frozen french fries, and $3.5 million for oranges. California grapes should particularly benefit because the Philippines is already the fourth-largest U.S. market.

The Philippines has implemented lower import tariffs for a range of U.S. horticultural commodities

Selected horticultural commodities include the following:

HS Code	Commodity	Previous Tariff (%)	1996	1998	2000
0803	Bananas	50	30	20	20
0805.10	Oranges	50	30	20	20
0805.20	Mandarins	50	30	20	20
0806.10	Grapes, fresh	50	30	20	10
0806.20	Raisins	50	10	10	10
0807.10	Melons	50	30	20	20
0807.20	Papayas	50	30	20	20
0808.10	Apples	50	30	20	10
0808.20	Pears	50	30	20	20
0810.10	Strawberries	50	30	20	20
2009.1190	Frozen OJ	50	30	20	10
2009.1990	Non-frozen OJ	50	30	20	20
2009.20	Grapefruit juice	50	30	20	10
2009.60	Grape juice and grape must	50	30	20	10
2009.70	Apple juice	50	30	20	10
2203	Beer from malt	50	30	20	20
2204	Wine including sparkling wine	50	30	20	20

WORLD UPDATE ON APPLES, PEARS, AND TABLE GRAPES, AND U.S. EXPORT PERFORMANCE

During marketing year 1995/96 (July-June), selected country apple exports are forecast at 3.9 million tons, 7 percent below the previous year's volume. Smaller apple crops in the United States and the European Union will reduce the availability of fruit, and export levels are expected to decrease for all countries except Canada, Chile, China, and South Africa. For the United States, apple exports are forecast at 544,000 tons, a 22 percent decline from last year because of reduced apple crops in California and Washington. For pears, selected country exports in 1995/96 are forecast at 1.2 million tons, 4 percent below last year. Only Belgium, Chile, the Netherlands, and South Africa are forecast to increase exports. U.S. pear exports in 1995/96 are forecast at 130,000 tons, 4 percent below last year. For table grapes, exports in calendar year 1995 from selected countries are estimated at 1.5 million tons, a 12 percent decline from 1994, because of reduced shipments by Chile and Italy. U.S. table grape exports in 1995 were about 210,000 tons, 5 percent below 1994, with shipments declining to Mexico, Japan, and Taiwan.

APPLES

In 1995/96 world production of apples, for selected countries, is forecast at 37.05 million tons, down 2 percent from last year. Lower production in Europe and the United States is offsetting higher production in China. Because of the reduced crop, exports for selected countries in 1995/96 are forecast at 3.9 million tons, 7 percent from below year.

Southern Hemisphere

Southern Hemisphere apple production drops slightly in 1995/96

The leading commercial apple producers in the Southern Hemisphere are expected to harvest a crop totaling 3.8 million tons in the 1995/96 season (crop harvested in early-1996), down slightly from the record 1994/95 crop. Modest declines are indicated in Argentina, Australia, and New Zealand, with increases in Brazil, Chile, and South Africa.

Southern Hemisphere apple exports are forecast at 1.2 million tons, about equal to last year. The United States and Europe remain the major export markets for Argentina and Chile, while Southeast Asia is the major export destination for Australia and New Zealand.

Argentina's apple exports forecast to fall slightly due to production shortfall, while imports of U.S. product remain limited.

In 1995/96 Argentina's apple production is forecast at 951,000 tons, 10 percent below 1994/95. Apple output increases in the major producing provinces of Rio Negro and Neuquen will be offset by decreases in output in the Mendoza Province where frost affected 50 percent of the crop.

Exports of Argentine apples in 1996 are forecast at 200,000 tons, a 6 percent drop from last year due to the forecast decline in production. Though Argentina produces more apples than Chile, it exports only one-half the quantity because of higher domestic consumption. Brazil and The Netherlands purchase about 75 percent of Argentina's apple exports.

Argentina's apple imports are relatively insignificant

and sourced from Brazil and Chile. Though technically feasible, U.S. apples were not imported by Argentina in 1994/95, nor thus far in the 1995/96 season, because of the strict phytosanitary requirements.

Australia maintains efforts to market "Australia Fresh" in key Asian markets, though a smaller crop in 1995/96 will reduce overall exports

During 1995/96 apple production is expected to decline 7 percent from 1994/95, to 320,000 tons. Dry weather during the start of the season resulted in many trees either not flowering or light flowering. Planted area is forecast to increase slightly in 1995/96, and some older trees have been pulled and replanted with new varieties including Pink Lady, Fuji, and Gala.

Australia's apple exports during 1995/96 are forecast at 30,000 tons, a decline of 6 percent because of the smaller crop. Apple sales to South East Asian markets, including Singapore, Malaysia, and Indonesia, comprise over 75 percent of total proceeds, posing a challenge to U.S. export opportunities in this region. Taiwan is another market where Australian apples are present in increasing volume.

Overseas, Australia continues aggressive marketing efforts for apples and other horticultural products. During 1995 the Australians introduced the "Australia Fresh" logo, replacing exporters' individual logos, in an effort to build market preference.

Fire blight is a major impediment to importing apples into Australia, which is free of fire blight. Canada, New Zealand, and the United States continue their collaboration with Australian authorities to gain access to the market.

Apple imports by Brazil may reach 100,000 tons during 1996; steady import demand continues despite arrival of local crop

Brazil's 1995/96 apple crop is forecast at 515,600 tons, 7 percent above last year's crop, because of an increase in bearing area. Apple crop area is composed of 47 percent Galas, 42 percent Fujis, 5 percent Golden Delicious, and 6 percent other varieties. The quality of the 1995/96 crop is expected to be good, with sizes averaging slightly larger than a year ago. However, hail damage occurred in the State of Santa Catarina, and a reported 70,000 tons of apples were damaged and sent to processing.

Brazilian imports of apples continue steady growth because of the high value of the Real and strong consumer demand. During 1996 imports of apples are forecast to reach 100,000 tons for the first time.

For U.S. apples, USDA's Marketing Promotion Program is helping to fuel import demand into January and February, the months when Brazil's apple crop arrives on the market. Participants have used in store promotions and other activities to improve the competitiveness of U.S. apples during 1996.

Import market share in Brazil for U.S. apples reached 18 percent during 1994 with Argentina supplying the majority. The U.S. share is forecast to increase during 1995 and 1996.

During 1996 USDA will continue collaborative efforts with Brazilian quarantine officials in hopes of relaxing that country's strict import requirements.

Chile, the largest Southern Hemisphere apple exporter, continues to boost sales in 1996 despite grower indebtedness

Chilean apple production is forecast at 910,000 tons in 1995/96, an increase of 6 percent from last year, due to favorable weather and a significant increase in bearing apple trees. Producers continue to diversify their orchards by planting new varieties--such as Fuji, Gala, Jonathan, and Braeburn--and uprooting traditional varieties such as Red Delicious, Richard Red, and Starking.

Red apple varieties still comprise about two-thirds of exports, but sweet/sour varieties are increasing their share. The principal green variety, Granny Smith, is used both for fresh export--mainly to Europe and the United States--as well as for concentrated apple juice production.

During 1995/96 Chile's improved apple crop, both in quality and quantity, is forecast to boost exports to 440,000 tons, an increase of 5 percent over the

previous year. The EU, Saudi Arabia, and Colombia are the top three markets for Chilean apples with the United States close behind, by volume.

In spite of higher volume of exports in 1995/96, economic returns to growers are insufficient. Indebtedness and bankruptcy face some growers. The financial difficulties stem from the high peso value, increasing production costs, and a lack of mandatory uniform quality standards.

In the absence of mandatory quality control programs, Chilean fruit exporters focus efforts on promotional campaigns, diversifying export markets, and trade liberalization. In recent years, Chile has signed free-trade agreements with Colombia, Ecuador, Mexico, and Venezuela. Chile is also negotiating phytosanitary agreements with countries in Asia, including China, Hong Kong, Japan, and New Zealand, and in Latin America, including Mexico and Venezuela.

Further opening the possibility for new Chilean apple export markets, on December 13, 1995, the Government of Chile officially declared the country free of the Mediterranean fruit fly (Medfly). The determination follows 32 years of Medfly detections and subsequent attempts to rid the country of the pest. Chile's Medfly-free status may open export opportunities for other Chilean fruits, notably citrus, table grapes, and kiwifruit. One Chilean press report suggested that shipments of fresh fruits and vegetables to Asia could increase by $500 million annually within 5 years as a result of the Medfly development.

Chile hopes to gain footholds in Japan's market for its apples and pears, which have been banned due to the Medfly situation. In addition, it is expected the country will be seeking Medfly-free recognition from other countries in the region, including Korea, Taiwan, and China.

U.S. imports of Chilean produce will not be significantly impacted by the announcement that the United States has recognized most of Chile's production areas as Medfly-free for several years.

For U.S. apples, the Chilean market is closed due to Chile's strict phytosanitary requirements. If these regulations were relaxed, there are marketing windows in Chile for U.S. apples during the off-season. During 1996 Chilean authorities and USDA officials will continue meetings in hopes of resolving the remaining technical barriers to trade.

New Zealand's crop abundant for second straight year, ensuring that ENZA-labeled apples remain prominent on world markets

In 1995/96 apple production in New Zealand is forecast at 482,400 tons, down slightly from the bumper crop last season. A large blossom after a favorable winter and spring weather is expected to result in another large crop this season. Climatic conditions have returned to normal after several abnormal years. The quality of this year's crop is good, but fruit size is slightly smaller than last year.

New Zealand, second only to Chile as an exporter in the Southern Hemisphere, is forecast to export 313,000 tons in 1995/96, about 3 percent less than the previous year. Leading destinations for New Zealand apples in 1994/95 were the EU (65 percent), the United States (13 percent), Asia (11 percent), and other countries including Mexico and Russia (11 percent).

Sales to Japan were less than expected in 1994/95 due to the detection of fire blight in 65 percent of a consignment.

The ENZA brand label, established by New Zealand's Apple and Pear Marketing Board, continues targeting worldwide customers and typifies the board's intensive marketing efforts to increase sales. ENZA even sponsored New Zealand's Black Magic in the America's Cup races, further enhancing the positive image of New Zealand's fresh fruit.

United States export prospects are limited in 1995/96 because the board and other operators put domestic fruit into long-term storage. Controlled atmosphere storage is sufficient to maintain the supply of domestic apples year-round. New Zealand is forecast to import only 90 tons of apples in 1995/96.

South Africa exports forecast up during 1995/96 to meet import demand in the EU

The 1995/96 crop is forecast at 600,000 tons, up 4 percent from 1994/95, because of a 3 percent increase in harvested area and improved growing conditions. Granny Smith, Golden Delicious, and Starking variety apples dominate bearing tree production in South Africa. However, new plantings show a shift to the varieties of Gala and Royal Gala.

South Africa's apple exports during 1995/96 are forecast to be 225,000 tons, an increase of 11,000 tons from last year but about the same as 1993/94. About 75 percent of South Africa apples are exported to the EU, so the season's shortfall in that region bodes well for South African fruit. The United States and Australia are other major markets.

UNIFRUCO, the main voice of the fruit industry, is geared to improving production, quality, and marketing of South Africa's produce. To meet the anticipated global demand for South African fruit, the fruit industry is opening new sales offices in Croatia, Russia, and Vienna, increasing to 65 the number of offices abroad.

As with Australia and Chile, South Africa's imports of apples are minimal.

Northern Hemisphere Updates

The following Northern Hemisphere information updates the "World Fresh Apple and Pear Update" article released in the November 1995 issue of USDA's *World Horticultural Trade & U.S. Export Opportunities*.

Northern Hemisphere's apple production in 1995/96 is now estimated at 33.27 million tons, down 2 percent from 1994/95. The decrease reflects lower production in Europe and the United States offsetting higher production in China.

United States apple exporters anticipate a strong export season in 1995/96 with higher prices resulting from reduced U.S. and European Union crops and strong consumer demand in Asia and Latin America

Apple production for 1995/96 is estimated at 5.0 million tons, 4 percent less than 1994/95, but 3 percent above 1993/94. Reduced apple production in Washington and California contributed to a drop in production from last year's record-high crop. Ideal growing conditions in Michigan, along with relatively favorable weather in the Eastern States, resulted in larger crops in Michigan, New York, and Pennsylvania.

Strong domestic and export demand, coupled with the smaller U.S. crop, have buoyed apple prices this season. Additionally, fresh apple prices are forecast to remain high because strong demand for juice apples results in more apples being sold to processors, thus reducing the supply of the fresh pack. Higher prices for imported juice concentrate will also encourage more processing of the domestic crop.

During 1995/96 total U.S. apple exports are forecast at 544,000 tons, down 22 percent from last season's record level owing to the smaller domestic crop. Value-wise, total apple exports July - November 1995 are at a pace only 15 percent behind last season because the FOB price is up 10 percent from last season ($588 to $644 per ton). The prospects for the remainder of the season are strong because the weak U.S. dollar makes U.S. apples price-competitive.

The top 5 U.S. markets this season, by volume, are Taiwan, Canada, Mexico, Hong Kong, and Indonesia. Exports are down to all these markets except Indonesia and Hong Kong. Indonesia sales have reached 46,000 tons, up 60 percent in 1995 over the comparable July - November period of 1994.

The most promising export markets are in Latin America and Asia. Brazil and Colombia are showing new growth while, exports to Mexico have fallen due to the decline of the peso. Mexico is still considered a long term growth market, but its economic recovery willl take a few years.

Asia is the most important export market for the Northwest and California. Taiwan and Hong Kong are the two largest export markets in Asia, and represent mature markets. Thailand and Indonesia are growing export markets, and the Russian Federation and Vietnam are emerging markets

USDA's Market Promotion Program (MPP) funds,

totaling about $4.5 million for apples, will be targeted for activities in Brazil, China, Hong Kong, Indonesia, Japan, Malaysia, Mexico, the Philippines, the Russian Federation, Saudi Arabia, Singapore, Taiwan, Thailand, the United Kingdom, and Venezuela. New countries, such as Colombia and Vietnam are under consideration for FY 1996.

PEARS

For pears, exports by selected countries in 1995/96 will be 1.2 million tons, down 4 percent from last year. The export decrease in these countries is the result of a decreased overall pear crop, forecast at 5.5 million tons, a 4 percent decrease from last year. The supply of fruit for export will be more limited than last season because of lower production in Europe and the United States.

Southern Hemisphere

Pear production in the Southern Hemisphere for the 1995/96 season (crop harvested in early-1995) is projected at 1.1 million tons, slightly higher than 1994/95. The only country forecasting lower production in 1995/96 is Argentina, the largest pear producing country in the Southern Hemisphere.

Pear exports in 1995/96 by Southern Hemisphere countries are forecast to be 482,000 tons, a slight decrease from the previous year. Exports from Argentina, the largest exporter in the Southern Hemisphere, will be down by 5 percent to 200,000 tons.

Argentina's production and exports of pears forecast to drop slightly in 1995/96

Pear production in 1995/96 is forecast at 391,000 tons, down 3 percent from 1994/95, because of frost damage in Mendoza province. Pear quality is expected to be normal, although some fruit with rings caused by frosts in Mendoza will be used for juice processing.

Argentina's major export markets are Brazil, Italy, and the United States. In 1995/96 total exports are forecast at 200,000 tons, a 5 percent drop from last year attributed to reduced domestic supplies. Imports of pears are limited and come mostly from Brazil.

Australia's pear marketing efforts and quality-control program target exports to South East Asian countries

The 1995/96 crop is forecast up 2 percent from last season, to 145,000 tons, because of an increase in bearing trees and favorable weather which increased yields. Bartlett and Packham varieties remain dominant in Australia; however, plantings of the higher density Nashi variety are increasing. As Nashi pears become more prevalent, overall yields are estimated to decline because Nashis are a lower-yielding variety.

Exports of fresh Australian pears are forecast at 25,000 tons in 1995/96, slightly above last year's level but 7 percent below 1993/94. Like apples, the Asian market is the major destination for Australian pears. The major markets are Malaysia, Singapore, The Philippines, Indonesia, and Hong Kong.

The Australian Horticultural Corporation (AHC), established in 1988 to promote Australian products in domestic and export markets, recently introduced a quality certification scheme to recognize companies meeting strict quality standards. Such a standard is vital to the export industry. Though no pear operations have achieved these standards, 11 companies are making progress.

The AHC also supports export market development throughout its Asian markets including in-store promotions and retail training in Singapore and Malaysia. In Indonesia public relation campaigns were launched aimed at schools and the food sector.

Chilean pear exports up in 1995/96 due to forecast production increase over last year--The Netherlands, the United States, and Brazil are strong markets

Pear production in 1995/96 is forecast up 2 percent, to 240,000 tons, because of favorable weather and an increase in the number of bearing trees. Improved economic returns for most pear producers during the 1994/95 season resulted in an apparent halt in the uprooting of orchards. Chile's pear industry is expected to continue to replace sand pears with European pear varieties to satisfy demand in the United States, Chile's largest pear market.

Chile is forecast to export 150,000 tons in 1995/96, 6 percent above last year but below the 157,000

tons shipped in 1993/94. The volume and quality of the anticipated crop is good for exports.

The European Union, lead by the Netherlands, is Chile's largest export market for pears, followed by the United States. Significant export growth has also occurred to the Far East and Latin America. In 1994/95, Latin American sales, primarily to Brazil, were partially compensated for decreased shipments to the United States.

Although there is no mandatory quality control program for pears, most Chilean producers have agreed to adhere to standards in the hopes of increasing export prices and avoiding poor economic returns facing some in the industry.

As with apples, Chile does not import fresh pears because of the ban resulting from phytosanitary requirements imposed by Chile's plant quarantine agency, SAG. Market windows would exist for counter-seasonal imports for the United States if the plant quarantine problem were ended.

New Zealand's exports of ENZA-labeled pears, though limited, continue presence in the United States and the EU

The 1995/96 crop is forecast at 20,200 tons, up 3 percent from last season, because of favorable weather and a small increase in bearing area. Pear production is projected to continue to grow at 1 to 2 percent per year for the next several years. Over 70 percent of New Zealand's pear production is consumed domestically.

During 1995/96 the export forecast is 3,400 tons, and the United States and the EU are the major destinations.

South Africa's pear exports in 1995/96 are expected to increase

Pear production in 1995/96 is forecast at 256,400 tons, up 4 percent from 1994/95, because of favorable weather and a slight increase in harvested area. Two varieties of pears--Packham's Triumph and Bon Chretien--dominate bearing tree production. However, new plantings of Forelle, Bosc, and Comice pear varieties are slowly redistributing production.

South Africa's pear exports during 1995/96, forecast at 104,000 tons, are 4 percent above last year because of the anticipated good crop and strong import demand. The EU imports about 90 percent of South Africa's pears with the United Kingdom being the largest market.

Marketing of South Africa pears in 1996, following the same scheme as fresh apples, will focus on improved quality, packaging, and market promotion.

Northern Hemisphere Updates

The following production and trade information updates the "World Fresh Apple and Pear Update" article from the November 1995 issue of *World Horticultural Trade and U.S. Export Opportunities*.

Pear production in the Northern Hemisphere in 1995/96 is estimated at 4.5 million tons, down 5 percent from 1994/95 and down slightly from the October forecast (WAP 10-95). The estimated downturn reflects a decrease in the U.S. estimate from 873,900 tons in October to 856,600 tons, because of lower-than-expected production of Bartlett pears due to inclement spring weather.

Though total U.S. pear production is down 8 percent in 1995/96, strong export demand and a large crop of Anjou and Bosc pears is supporting prices

The 1995/96 pear crop is forecast at 943,550 tons, down 10 percent from last year's record high. Most major pear-producing States posted smaller crops, except for Michigan, Pennsylvania, and Washington. California and Oregon, the second and third largest producers, were down 27 percent and 11 percent, respectively. The tighter domestic supplies in 1995/96 will help boost grower prices for fresh market pears.

Production of other-than-Bartlett varieties, including the export varieties Anjou and Bosc, was down less than 1 percent from a year ago, reflecting Oregon's smaller output. Production of other-than-Bartlett varieties in California remained unchanged from last year, while in Washington it was up 6 percent.

Fresh use and processing use of Bartlett pears were down 28 percent and 24 percent respectively, from a year ago. Fresh use accounted for 26 percent of

the harvested tonnage in 1995, while processing use accounted for 74 percent.

Tighter domestic supplies of pears in 1995/96 will help boost grower prices for fresh market pears. July-October 1995 grower prices averaged 63 percent higher than the same period in 1994.

U.S. pear exports in 1995/96 are forecast at 130,000 tons, 4 percent below last year due to a smaller overall U.S. crop and higher FOB prices. Shipment declines to Mexico and Saudi Arabia are offsetting increases to Brazil, Hong Kong, and Taiwan.

However, by value, total U.S. pear exports July - November 1995 are actually 6 percent above last year. The FOB price is an average $554/ton this season, 10 percent above last year's price during the same time period. Despite the relatively higher U.S. pear prices, strong consumer demand in Asian and Latin America markets continues to push sales upward.

USDA's Market Promotion Program efforts, totaling $1.1 million in FY 1995, promote U.S. pear sales in key overseas markets. Marketing activities are underway in Brazil, Colombia, Costa Rica, Germany, Hong Kong, Indonesia, Mexico, Saudi Arabia, Singapore, Sweden, Taiwan, United Arab Emirates, and Venezuela.

In Latin America, Brazil and Colombia are the most promising markets for pears. In fact, based on shipments through July - November 1995, Brazil is second only to Canada as a U.S. export market. In 1995/96 Mexico is still the third-leading export market for U.S. pears, though shipments are one-third below last year's level due to the devaluation of the peso in December 1994.

Taiwan and Hong Kong remain the most important markets in Asia. While China is not officially open for U.S. pears, large volumes are being transhipped via Hong Kong into South China. Efforts by USDA to open the China market focus on removing the phytosanitary restrictions on U.S. pears.

Europe is becoming a difficult market because of increased competition from European competitors and higher tariffs under the new EU entry price system. The only exception is Sweden. However, Sweden represents a mature market for U.S. pears.

TABLE GRAPES

In 1995 world production of grapes, for selected countries, is estimated at 8.0 million tons, about equal to 1994. Exports for these selected countries are forecast at 1.5 million tons, down 12 percent because of decreased shipments by the European Union.

Southern Hemisphere

The forecast for the Southern Hemisphere's 1996 table grape production is 1.1 million tons, down slightly from 1995. Production declines forecast for Argentina and Chile will be partially offset by a 9-percent increase in the forecast for South Africa's output.

Argentina's production of table grapes revised significantly downward and exports remain limited

Based on new information published by the National Wine Institute in Argentina, estimates on production of table grapes in Argentina have been revised downward for the past several years. Preliminary assessments indicate table grape production in 1996 will total 58,000 tons, down 9 percent from 1995, because of October frosts in Mendoza. Although the main producing province for table grapes is San Juan, Mendoza also has significant amounts of commercial production. Favorable weather in San Juan was ideal for fruit set and quality is reportedly good.

The Netherlands and Brazil are the principal buyers of Argentine table grapes, importing over 80 percent of all exported product. Argentina also imports table grapes, unlike Chile and South Africa, and Brazil and Chile are the main suppliers. The United States also ships several hundred tons per year to Argentina, and in 1995 export value reached about $350,000, down 30 percent from 1994.

Chile's grape exporters receiving better prices due to late opening of season and strong U.S. market

Production of table grapes is forecast to decrease slightly in 1996, to 845,000 tons. Unusually cold

weather at the beginning of the growing season and insufficient temperatures in December affected grape maturation, delaying the harvest for one to two weeks.

After a decline in planted area in 1995, total planted area is estimated to have stabilized at 47,000 hectares. New plantings are now only replacing aging vineyards, predominantly with new varieties that better reflect market demand, such as Red Globe. Chile produces over 36 grape varieties for export, and Thompson Seedless, Flame Seedless, and Ribier comprise the bulk of production.

Delayed ripening also caused the export season to begin later during 1995/96, and exports are forecast at 432,000 tons, down 5 percent from last year. Export prices are excellent for the white varieties and less so for the dark varieties.

Of Chile's total grape exports, the United States purchases about 60 percent and the Netherlands about 13 percent. This share was constant in 1994 and 1995, but variations occurred in the market share to other countries. For example, Brazil emerged as an important market for Chile in 1995, importing 13,000 tons, up 160 percent from the previous year. Mexico's imports of Chilean table grapes, on the other hand, were 8,000 tons, down 70 percent in 1995.

South Africa's table grape production and exports forecast up in 1995/96

Table grape output in 1996 is forecast at 152,000 tons, up 9 percent from 1995, because of favorable weather and a slight increase in harvested area. South Africa also continued to increase planted area in anticipation of the projected increase in domestic and foreign demand.

South Africa exports about 90 percent of its table grapes to the EU while only small volumes are exported to the Canada and the United States.

Northern Hemisphere Updates

The following production and trade information updates the "Table Grape Situation for Selected Countries" article in the December 1995 issue of *World Horticultural Trade and U.S. Export Opportunities*.

The 1995 estimate for table grape production in the Northern Hemisphere--including the United States--is 6.9 million tons, virtually unchanged from 1994. Modest output increases in most reporting countries offset declines in Greece and Italy. An estimate for the 1996 Northern Hemisphere crop will be released in October 1996.

U.S. table grape shipments in 1995 at a pace to equal the $256 million shipped in 1994

U.S. table grape production for 1995 is estimated at 751,000 tons, up 2 percent from 1994 and 3 percent from 1993, due to an increase in California's crop.

The top three U.S. table grape production states in 1995 are California, Washington, and New York, providing 96 percent of the U.S. crop. California provided 88 percent of the 1995 crop.

Washington's table grape crop increased 37 percent from a year ago, and represents 5 percent of the U.S. crop. New York's output declined 8 percent from the previous year, and accounted for 3 percent of the U.S. total.

Exports of U.S. grapes in 1995 are estimated at 207,000 tons, down 5 percent from 1994. But value-wise, shipments in 1995 were about equal 1994's total of $256 million. In 1995 sales volume is down to Mexico and Taiwan.

Latin America and Asia remain the most important export regions, and also possess the most potential for growth. A MPP budget for 1995/96 of $2.8 million funds promotion programs in Brazil, Costa Rica, Guatemala, Hong Kong, Indonesia, Japan, Korea, Malaysia, Mexico, New Zealand, the Philippines, Singapore, Taiwan, Thailand, the United Kingdom, Venezuela, and Vietnam. A regional promotion for Scandinavia was also funded.

The most important growth markets for table grapes are Hong Kong (and China), Indonesia, the Philippines and Mexico. Stable and mature markets include Taiwan, the United Kingdom, Japan, and Singapore. Malaysia, Vietnam, Korea, Brazil, and various countries in Central America represent

emerging new markets or ones with future potential. On the import side, U.S. purchases in 1995, with about 75 percent from Chile alone, are estimated at 360,000 tons, down 11 percent from the year before.

(For further information on supply, distribution, and trade, contact Casey Bean at 202-720-4620. For information on production, contact Kelly Strzlecki at 202-720-6791. For information on marketing, contact Laura Davis at 202-720-2252.)

TABLE 1
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES (METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consump.	Processed	With- drawals
NORTHERN HEMISPHERE COUNTRIES								
EUROPEAN UNION (EU)								
Austria 1/								
1993/94	318,200	157,200	4,100	322,300	25,800	292,500	4,000	0
1994/95	286,700	146,900	15,000	301,700	30,000	258,700	13,000	0
1995/96	317,900	156,700	20,000	337,900	38,000	289,900	10,000	0
Belgium								
1993/94	530,215	529,137	75,000	605,215	155,000	269,066	106,000	75,149
1994/95	527,650	526,550	80,000	607,650	190,000	268,316	105,500	43,834
1995/96	514,910	514,300	75,000	589,910	190,000	268,440	115,000	16,470
Denmark								
1993/94	85,000	45,000	25,000	110,000	3,000	80,000	26,500	500
1994/95	77,500	37,500	31,600	109,100	1,600	85,000	22,000	500
1995/96	65,000	30,000	30,000	95,000	1,500	75,000	18,000	500
France								
1993/94	2,079,000	2,043,700	97,200	2,176,200	620,200	874,600	238,900	442,500
1994/95	2,166,300	2,128,300	86,200	2,252,500	642,800	953,400	275,000	381,300
1995/96	2,088,600	2,054,600	90,000	2,178,600	610,000	993,600	275,000	300,000
Germany								
1993/94	1,718,500	882,500	717,718	2,436,218	43,856	1,300,000	1,046,062	46,300
1994/95	2,079,500	879,500	631,858	2,711,358	65,078	1,453,200	1,166,680	26,400
1995/96	1,372,600	572,600	800,000	2,172,600	30,000	1,100,000	1,022,600	20,000
Greece								
1993/94	325,341	312,341	11,008	336,349	9,045	220,795	800	105,709
1994/95	321,996	309,096	8,000	329,996	13,000	206,736	600	109,660
1995/96	280,000	268,800	15,000	295,000	8,000	206,500	500	80,000
Italy								
1993/94	2,145,000	2,105,000	32,830	2,177,830	430,108	1,133,722	509,000	105,000
1994/95	2,153,000	2,113,000	39,000	2,192,000	488,000	1,228,000	450,000	26,000
1995/96	1,947,000	1,907,000	50,000	1,997,000	430,000	1,147,000	420,000	0
Netherlands								
1993/94	670,000	603,000	252,876	922,876	448,765	365,111	84,000	25,000
1994/95	580,000	520,000	277,736	857,736	350,676	372,060	80,000	55,000
1995/96	570,000	515,000	220,000	790,000	340,000	360,000	70,000	20,000
Spain								
1993/94	890,500	860,500	147,000	1,037,500	40,000	730,500	210,000	57,000
1994/95	739,400	714,400	143,400	882,800	34,800	682,000	141,000	25,000
1995/96	842,400	817,400	119,000	961,400	40,000	672,400	209,000	40,000

TABLE 1 (CONT'D.)
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consump.	Processed	With- drawels
Sweden								
1993/94	67,562	17,562	90,379	157,941	1,508	150,000	6,433	0
1994/95	70,000	20,000	90,000	160,000	1,500	151,500	7,000	0
1995/96	66,700	16,700	90,000	156,700	1,300	150,400	5,000	0
United Kingdom								
1993/94	324,600	324,600	418,897	743,497	55,895	650,999	35,706	897
1994/95	275,892	275,892	434,809	710,701	53,101	626,480	30,348	772
1995/96	208,691	208,691	502,000	710,691	35,477	651,674	22,956	584
SUBTOTAL--EU								
1993/94	9,153,918	7,880,540	1,872,008	11,025,926	1,833,177	6,067,293	2,267,401	858,055
1994/95	9,277,938	7,671,138	1,837,603	11,115,541	1,870,555	6,285,392	2,291,128	668,466
1995/96	8,273,801	7,061,791	2,011,000	10,284,801	1,724,277	5,914,914	2,168,056	477,554
NON-EU COUNTRIES								
Bulgaria								
1993/94	109,858	82,000	23,397	133,255	639	55,000	60,616	17,000
1994/95	76,477	57,400	10,558	87,035	523	44,512	33,000	9,000
1995/96	74,000	56,000	13,000	87,000	500	39,500	38,000	9,000
Canada								
1993/94	488,400	488,400	98,416	586,816	50,196	343,620	193,000	0
1994/95	560,277	560,277	100,952	661,229	76,292	364,937	220,000	0
1995/96	600,000	600,000	105,000	705,000	90,000	365,000	250,000	0
China								
1993/94	9,070,000	6,350,000	1,049	9,071,049	119,418	8,497,631	454,000	0
1994/95	11,125,000	7,787,500	3,438	11,128,438	107,212	10,464,976	556,250	0
1995/96	12,237,500	8,566,250	7,807	12,245,307	117,933	11,515,499	611,875	0
Hungary								
1993/94	819,000	426,000	0	819,000	231,000	298,000	290,000	0
1994/95	610,000	330,000	3,400	613,400	101,200	162,200	350,000	0
1995/96	500,000	280,000	14,000	514,000	90,000	200,000	224,000	0
Japan								
1993/94	1,011,000	928,700	50	1,011,050	2,140	828,010	180,900	0
1994/95	989,300	909,700	8,900	998,200	1,800	814,000	182,400	0
1995/96	970,100	891,800	7,500	977,600	2,000	804,600	171,000	0
Mexico								
1993/94	538,000	468,000	160,000	698,000	0	578,000	120,000	0
1994/95	475,000	425,000	75,000	550,000	0	445,000	105,000	0
1995/96	470,000	420,000	65,000	535,000	0	450,000	85,000	0
Norway								
1993/94	58,559	27,390	33,335	91,894	0	71,648	9,932	10,314
1994/95	45,291	16,593	42,354	87,645	0	67,344	2,700	17,601
1995/96	48,917	19,677	40,000	88,917	0	66,060	5,500	17,357

TABLE 1 (CONT'D.)
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consump.	Processed	With- drawels
Poland								
1993/94	1,842,000	1,500,000	44,000	1,886,000	176,000	560,000	1,150,000	0
1994/95	1,441,100	1,241,100	26,560	1,467,660	115,102	450,000	902,558	0
1995/96	1,200,000	1,000,000	26,000	1,226,000	100,000	300,000	826,000	0
Romania								
1993/94	1,097,158	972,158	7,000	1,104,158	60,000	864,158	150,000	30,000
1994/95	525,000	450,000	7,000	532,000	30,000	410,000	77,000	15,000
1995/96	500,000	420,000	8,000	508,000	18,000	390,000	90,000	10,000
Russia								
1993/94	1,425,000	1,070,000	175,000	1,600,000	0	720,000	480,000	400,000
1994/95	1,154,000	804,000	410,550	1,564,550	1,703	744,600	503,700	314,547
1995/96	1,050,000	710,000	425,500	1,475,500	0	710,000	450,500	315,000
Serbia/Montenegro								
1993/94	190,000	135,000	0	190,000	0	156,000	34,000	0
1994/95	148,000	103,000	0	148,000	0	116,000	32,000	0
1995/96	135,000	95,000	0	135,000	0	105,000	30,000	0
Slovakia								
1993/94	112,000	107,000	0	112,000	17,000	65,000	30,000	0
1994/95	57,000	53,000	18,400	75,400	4,400	56,000	15,000	0
1995/96	70,000	64,000	14,000	84,000	6,000	60,000	18,000	0
Taiwan								
1993/94	8,128	8,128	107,544	115,672	0	115,672	0	0
1994/95	8,469	8,469	127,894	136,363	23	136,340	0	0
1995/96	9,482	9,482	128,000	137,482	0	137,482	0	0
Turkey								
1993/94	2,080,000	2,080,000	36,795	2,116,795	30,676	1,982,119	104,000	0
1994/95	2,095,000	2,095,000	8,378	2,103,378	30,021	1,968,607	104,750	0
1995/96	2,100,000	2,100,000	10,000	2,110,000	30,000	1,975,000	105,000	0
United States 2/								
1993/94	4,846,600	4,846,500	111,075	4,957,575	608,577	2,330,568	2,018,430	0
1994/95	5,216,600	5,216,600	126,404	5,343,004	697,829	2,461,030	2,184,145	0
1995/96	5,031,400	5,031,400	200,000	5,231,400	544,000	2,551,930	2,135,470	0
SUBTOTAL: NON-EU COUNTRIES								
1993/94	23,695,603	19,489,276	797,661	24,493,264	1,295,646	17,465,426	5,274,878	457,314
1994/95	24,526,514	20,057,639	969,788	25,496,302	1,166,105	18,705,546	5,268,503	356,148
1995/96	24,996,399	20,263,609	1,063,807	26,060,206	998,433	19,670,071	5,040,345	351,357
SUBTOTAL: NORTHERN HEMISPHERE COUNTRIES								
1993/94	32,849,521	27,369,816	2,669,669	35,519,190	3,128,823	23,532,719	7,542,279	1,315,369
1994/95	33,804,452	27,728,777	2,807,391	36,611,843	3,036,660	24,990,938	7,559,631	1,024,614
1995/96	33,270,200	27,325,400	3,074,807	36,345,007	2,722,710	25,584,985	7,208,401	828,911

TABLE 1 (CONT'D.)
APPLES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consump.	Processed	With-drawels
SOUTHERN HEMISPHERE COUNTRIES								
Argentina								
1993/94	1,006,384	1,006,384	5,465	1,011,849	146,799	310,000	555,050	0
1994/95	1,051,000	1,051,000	4,000	1,055,000	212,000	300,000	543,000	0
1995/96	951,000	951,000	4,000	955,000	200,000	265,000	490,000	0
Australia								
1993/94	307,000	307,000	0	307,000	28,637	158,363	120,000	0
1994/95	345,000	345,000	0	345,000	32,000	175,000	138,000	0
1995/96	320,000	320,000	0	320,000	30,000	160,000	130,000	0
Brazil								
1993/94	456,800	456,800	87,682	544,482	30,145	494,337	20,000	0
1994/95	483,200	483,200	95,000	578,200	12,085	526,115	40,000	0
1995/96	515,600	515,600	100,000	615,600	10,000	525,600	80,000	0
Chile								
1993/94	800,000	790,000	0	800,000	346,700	90,000	363,300	0
1994/95	860,000	850,000	0	860,000	420,000	92,000	348,000	0
1995/96	910,000	900,000	0	910,000	440,000	94,000	376,000	0
New Zealand								
1993/94	447,649	387,649	384	448,033	215,599	52,503	179,931	0
1994/95	485,680	430,680	94	485,774	321,900	49,706	114,168	0
1995/96	482,350	427,350	90	482,440	312,650	49,704	120,086	0
South Africa								
1993/94	637,692	637,692	0	637,692	224,731	225,844	187,117	0
1994/95	576,737	576,737	0	576,737	213,780	209,693	153,264	0
1995/96	600,000	600,000	0	600,000	225,000	225,000	150,000	0
SUBTOTAL: SOUTHERN HEMISPHERE COUNTRIES								
1993/94	3,655,525	3,585,525	93,531	3,749,056	992,611	1,122,647	1,633,798	0
1994/95	3,801,617	3,736,617	99,094	3,900,711	1,211,765	1,150,914	1,538,032	0
1995/96	3,778,950	3,713,950	104,090	3,883,040	1,217,650	1,141,504	1,523,886	0
WORLD TOTAL								
1993/94	36,505,046	30,955,341	2,763,200	39,268,246	4,121,434	24,655,366	9,176,077	1,315,369
1994/95	37,606,069	31,465,394	2,906,485	40,512,554	4,248,425	26,141,852	9,097,663	1,024,614
1995/96	37,049,150	31,039,350	3,178,897	40,228,047	3,940,360	26,726,489	8,732,287	828,911

1/ Data for Northern Hemisphere countries are for a July/June marketing year except Mexico and France which are August/July. In the Southern Hemisphere the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February of the second year indicated, and New Zealand where the year starts in October of the first year indicated. For Austria, processing apples are not included in production.
3/ U.S. import/export estimates based on U.S. Census Bureau data, through November 1995, comparing trends this season with the same time period in 1994 (July - November).

TABLE 2
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES (METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consumption	Processed	With-drawels
Austria								
1993/94	44,000	8,900	17,000	61,000	0	61,000	0	0
1994/95	37,600	7,300	22,400	60,000	0	60,000	0	0
1995/96	43,700	6,100	19,000	62,700	2,200	60,500	0	0
Belgium-Luxembourg								
1993/94	147,020	146,858	20,645	167,665	100,369	52,788	7,500	7,008
1994/95	155,090	154,540	15,000	170,090	105,000	54,205	7,755	3,130
1995/96	157,600	157,175	15,000	172,600	108,000	54,100	8,000	2,500
Denmark								
1993/94	8,200	6,200	8,000	16,200	200	15,950	0	50
1994/95	7,800	5,800	8,500	16,300	200	16,050	0	50
1995/96	6,400	4,600	9,000	15,400	100	15,250	0	50
France								
1993/94	251,100	245,500	108,000	359,100	57,600	249,900	45,000	6,600
1994/95	343,600	336,800	84,200	427,800	80,200	279,500	45,000	23,100
1995/96	308,600	302,600	100,000	408,600	70,000	271,600	45,000	22,000
Germany								
1993/94	414,000	43,000	165,320	579,320	7,619	280,320	290,501	880
1994/95	418,700	38,700	142,847	561,547	4,700	270,000	286,675	172
1995/96	419,500	39,500	150,000	569,500	7,000	265,000	297,300	200
Greece								
1993/94	81,045	78,615	2,857	83,902	170	70,407	8,365	4,960
1994/95	72,995	70,805	3,500	76,495	410	66,005	6,700	3,380
1995/96	65,000	63,000	5,000	70,000	200	61,800	6,000	2,000
Italy								
1993/94	938,000	878,000	79,174	1,017,174	153,463	723,711	130,000	10,000
1994/95	1,022,000	962,000	153,000	1,175,000	177,000	881,000	110,000	7,000
1995/96	986,000	926,000	160,000	1,146,000	170,000	876,000	100,000	0
Netherlands								
1993/94	170,000	153,000	86,339	256,339	154,421	96,718	4,000	1,200
1994/95	140,000	126,000	84,344	224,344	141,728	77,616	4,000	1,000
1995/96	160,000	144,000	80,000	240,000	155,000	80,000	4,000	1,000
Spain								
1993/94	474,600	455,400	31,100	505,700	40,400	436,800	20,000	8,500
1994/95	543,000	518,000	21,000	564,000	77,500	439,000	22,500	25,000
1995/96	432,800	417,800	45,000	477,800	35,000	420,000	14,800	8,000
Sweden								
1993/94	8,593	2,593	29,083	37,676	262	37,414	0	0
1994/95	5,800	1,000	30,000	35,800	260	35,540	0	0
1995/96	6,300	1,300	29,000	35,300	260	35,040	0	0

TABLE 2 (CONT'D.)
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consumption	Processed	With- drawels
United Kingdom								
1993/94	43,800	43,800	91,500	135,300	2,760	130,913	876	751
1994/95	25,846	25,846	106,500	132,346	1,550	130,229	516	51
1995/96	36,556	36,556	96,344	132,900	1,700	130,592	550	58
SUBTOTAL: EU								
1993/94	2,580,358	2,061,866	639,018	3,219,376	517,264	2,155,921	506,242	39,949
1994/95	2,772,431	2,246,791	671,291	3,443,722	588,548	2,309,145	483,146	62,883
1995/96	2,622,456	2,098,631	708,344	3,330,800	549,460	2,269,882	475,650	35.808
* OTHER NORTHERN HEMISPHERE COUNTRIES *								
Bulgaria								
1993/94	21,006	6,000	175	21,181	66	10,115	10,000	1,000
1994/95	33,009	9,000	184	33,193	44	13,000	17,649	2,500
1995/96	36,160	11,000	180	36,340	53	14,500	19,287	2,500
Canada								
1993/94	18,126	18,126	54,442	72,568	452	68,027	4,089	0
1994/95	15,793	15,793	59,555	75,348	85	69,763	5,500	0
1995/96	13,500	13,500	62,000	75,500	50	70,450	5,000	0
Japan								
1993/94	396,300	365,200	0	396,300	7,280	388,550	470	0
1994/95	431,100	398,200	0	431,100	3,800	426,760	540	0
1995/96	426,000	393,600	0	426,000	4,000	421,500	500	0
Mexico								
1993/94	39,500	35,500	57,000	96,500	0	94,000	2,500	0
1994/95	30,000	26,000	46,000	76,000	0	74,000	2,000	0
1995/96	30,000	26,000	42,000	72,000	0	71,000	1,000	0
Norway								
1993/94	2,915	1,461	15,450	18,365	0	16,497	0	1,868
1994/95	3,185	1,675	13,856	17,041	0	15,606	0	1,435
1995/96	2,841	1,409	14,000	16,841	0	15,693	0	1,148
Serbia/Montenegro								
1993/94	78,000	59,000	0	78,000	0	61,000	17,000	0
1994/95	73,000	56,000	0	73,000	0	56,000	17,000	0
1995/96	66,000	51,000	0	66,000	0	49,000	17,000	0
Turkey								
1993/94	420,000	420,000	0	420,000	6,444	392,556	21,000	0
1994/95	410,000	410,000	56	410,056	8,336	381,220	20,500	0
1995/96	410,000	410,000	0	410,000	7,500	382,000	20,500	0

TABLE 2 (CONT'D.)
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consumption	Processed	With- drawels
United States 2/								
1993/94	860,300	860,300	65,509	925,809	128,332	399,020	398,457	0
1994/95	949,100	949,100	48,038	997,138	134,774	413,680	448,684	0
1995/96	856,600	856,600	60,000	916,600	130,000	358,862	427,738	0
SUBTOTAL: OTHER NORTHERN HEMISPHERE COUNTRIES								
1993/94	1,836,147	1,765,587	192,576	2,028,723	142,574	1,429,765	453,516	2,868
1994/95	1,945,187	1,865,768	167,689	2,112,876	147,039	1,450,029	511,873	3,935
1995/96	1,841,101	1,763,109	178,180	2,019,281	141,603	1,383,005	491,025	3,648
SUBTOTAL: NORTHERN HEMISPHERE COUNTRIES								
1993/94	4,416,505	3,827,453	831,594	5,248,099	659,838	3,585,686	959,758	42,817
1994/95	4,717,618	4,112,559	838,980	5,556,598	735,587	3,759,174	995,019	66,818
1995/96	4,463,557	3,861,740	886,524	5,350,081	691,063	3,652,887	966,675	39,456
SOUTHERN HEMISPHERE COUNTRIES								
Argentina								
1993/94	406,922	406,922	1,446	408,368	142,567	115,801	150,000	0
1994/95	404,000	404,000	2,407	406,407	210,500	100,000	95,907	0
1995/96	391,000	391,000	2,500	393,500	200,000	99,000	94,500	0
Australia								
1993/94	161,000	161,000	65	161,065	26,580	52,000	82,485	0
1994/95	142,000	142,000	70	142,070	24,000	47,000	71,070	0
1995/96	145,000	145,000	75	145,075	25,000	49,000	71,075	0
Chile								
1993/94	232,000	230,000	0	232,000	156,800	55,200	20,000	0
1994/95	236,000	234,000	0	236,000	147,000	58,000	31,000	0
1995/96	240,000	238,000	0	240,000	150,000	59,000	31,000	0
New Zealand								
1993/94	19,376	12,876	300	19,676	3,164	13,830	2,682	0
1994/95	19,558	12,858	400	19,958	3,330	14,130	2,498	0
1995/96	20,187	13,487	400	20,587	3,404	14,500	2,683	0
South Africa, Republic of								
1993/94	252,815	252,815	0	252,815	87,555	43,910	121,350	0
1994/95	246,525	246,525	0	246,525	99,735	42,075	104,715	0
1995/96	256,386	256,386	0	256,386	103,724	43,758	108,904	0
SUBTOTAL: SOUTHERN HEMISPHERE								
1993/94	1,072,113	1,063,613	1,811	1,073,924	416,666	280,741	376,517	0
1994/95	1,048,083	1,039,383	2,877	1,050,960	484,565	261,205	305,190	0
1995/96	1,052,573	1,043,873	2,975	1,055,548	482,128	265,258	308,162	0

TABLE 2 (CONT'D.)
PEARS: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS)

Country/ Mktg Yr 1/	Total Production	Commercial Production	Imports	Supply/ Utilization	Exports	Domestic Consumption	Processed	With- drawels
WORLD TOTAL								
1993/94	5,488,618	4,891,066	833,405	6,322,023	1,076,504	3,866,427	1,336,275	42,817
1994/95	5,765,701	5,151,942	841,857	6,607,558	1,220,152	4,020,379	1,300,209	66,818
1995/96	5,516,130	4,905,613	889,499	6,405,629	1,173,191	3,918,145	1,274,837	39,456

1/ Data for Northern Hemisphere countries are for a July/June marketing year except Mexico and France which are August/July. In the Southern Hemisphere the marketing year begins on January 1 of the second year indicated, except for Chile where the year starts on February of the second year indicated, and New Zealand where the year starts in October of the first year indicated.
2/ U.S. import/export estimates based on U.S. Census Bureau data, through November 1995, comparing trends this season with the same time period in 1994 (July - November).

TABLE 3
TABLE GRAPES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS, NET WEIGHT)

Country/ Year 1/	Production	Imports	Supply/ Distribution	Exports	Fresh Consump.	Processing	Withdrawal	Ending Stocks
=========== Northern Hemisphere Countries ==============								
FRANCE								
1993	104,500	154,300	258,800	15,500	243,300	0	0	0
1994	79,100	156,900	236,000	13,400	222,600	0	0	0
1995	127,400	135,000	262,400	21,000	241,400	0	0	0
GREECE								
1993	353,283	230	353,513	74,142	168,326	77,700	33,345	0
1994	350,000	250	350,250	95,500	148,950	70,000	35,800	0
1995	330,000	250	330,250	90,000	150,250	65,000	25,000	0
ITALY								
1993	1,573,000	10,000	1,583,000	643,800	683,000	256,200	0	0
1994	1,550,000	11,000	1,561,000	660,000	651,000	250,000	0	0
1995	1,400,000	15,000	1,415,000	500,000	565,000	350,000	0	0
SPAIN								
1993	396,400	5,300	401,700	127,000	229,700	45,000	0	0
1994	316,800	12,900	329,700	89,300	210,400	30,000	0	0
1995	352,000	16,000	368,000	50,000	288,000	30,000	0	0
EU SUBTOTAL								
1993	2,427,183	169,830	2,597,013	860,442	1,324,326	378,900	33,345	0
1994	2,295,900	181,050	2,476,950	858,200	1,232,950	350,000	35,800	0
1995	2,209,400	166,250	2,375,650	661,000	1,244,650	445,000	25,000	0
MEXICO								
1993	140,000	30,000	170,000	47,500	122,500	0	0	0
1994	155,000	45,000	200,000	41,500	158,500	0	0	0
1995	170,000	25,000	195,000	60,000	135,000	0	0	0

TABLE 3 (CONT'D.)
TABLE GRAPES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS, NET WEIGHT)

Country/ Year 1/	Production	Imports	Supply/ Distribution	Exports	Fresh Consump.	Processing	Withdrawal	Ending Stocks
JAPAN								
1993	259,900	7,800	267,700	0	241,200	26,500	0	0
1994	245,700	9,650	255,350	2	227,348	28,000	0	0
1995	264,500	10,000	274,500	2	244,498	30,000	0	0
TURKEY								
1993	3,700,000	11	3,700,011	22,536	1,838,738	1,838,737	0	0
1994	3,450,000	7	3,450,007	26,258	1,711,875	1,711,874	0	0
1995	3,500,000	0	3,500,000	26,000	1,737,000	1,737,000	0	0
UNITED STATES 2/								
1993	726,300	321,467	1,047,767	203,813	843,954	0	0	0
1994	733,600	323,960	1,057,560	218,855	838,705	0	0	0
1995	751,100	360,000	1,111,100	207,000	904,100	0	0	0
SUBTOTAL NORTHERN HEMISPHERE								
1993	7,253,383	529,108	7,782,491	1,134,291	4,370,718	2,244,137	33,345	0
1994	6,880,200	559,667	7,439,867	1,144,815	4,169,378	2,089,874	35,800	0
1995	6,895,000	561,250	7,456,250	954,002	4,265,248	2,212,000	25,000	0
======= Southern Hemisphere Countries ========								
ARGENTINA								
1993	60,000	7,060	67,060	4,500	30,560	32,000	0	0
1994	58,100	3,866	61,966	4,909	25,057	32,000	0	0
1995	63,992	3,000	66,992	8,000	24,372	34,620	0	0
1996	58,000	3,500	61,500	7,500	20,000	34,000		0

TABLE 3 (CONT'D.)
TABLE GRAPES: PRODUCTION, SUPPLY, AND DISTRIBUTION IN SELECTED COUNTRIES
(METRIC TONS, NET WEIGHT)

Country/ Year 1/	Production	Imports	Supply/ Distribution	Exports	Fresh Consump.	Processing	Withdrawal	Ending Stocks
CHILE								
1993	855,000	0	855,000	441,000	90,000	324,000	0	0
1994	855,000	0	855,000	458,700	90,000	306,300	0	0
1995	855,000	0	855,000	456,000	91,000	308,000	0	0
1996	845,000	0	845,000	432,000	92,000	321,000	0	0
SOUTH AFRICA								
1993	113,075	0	113,075	67,075	42,500	3,500	0	0
1994	143,463	0	143,463	93,755	46,708	3,000	0	0
1995	139,000	0	139,000	90,000	45,500	3,500	0	0
1996	152,000	0	152,000	98,000	50,000	4,000	0	0
SUBTOTAL SOUTHERN HEMISPHERE								
1993	1,028,075	7,060	1,035,135	512,575	163,060	359,500	0	0
1994	1,056,563	3,866	1,060,429	557,364	161,765	341,300	0	0
1995	1,057,992	3,000	1,060,992	554,000	160,872	346,120	0	0
1996	1,055,000	3,500	1,058,500	537,500	162,000	359,000	0	0
TOTAL SELECTED COUNTRIES								
1993	8,281,458	536,168	8,817,626	1,646,866	4,533,778	2,603,637	33,345	0
1994	7,936,763	563,533	8,500,296	1,702,179	4,331,143	2,431,174	35,800	0
1995	7,952,992	564,250	8,517,242	1,508,002	4,426,120	2,558,120	25,000	0
1996	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

1/ Calendar year for all countries. EU data includes intra-EU trade.
2/ For 1995, U.S.import/export data from the U.S. Bureau of Census is only available through November 1995. To estimate entire year's figures, compared trade trends between periods Jan-Nov 1994 and Jan-Nov 1995.

KIWIFRUIT SITUATION FOR SELECTED COUNTRIES

The world kiwifruit situation is characterized by bipolar production, with the harvest in the Northern Hemisphere (October-November) generally complementing supplies harvested in the Southern Hemisphere (April-June). Kiwifruit production and trade in 10 major producing countries have increased dramatically over the past decade, especially in the European Union (EU). By the end of the 1980s, production had far out paced demand from the importing countries. This situation led to considerable vine-pulling and generally slower growth in planted area. Increases in world kiwifruit production, combined with improved storage facilities and technology (e.g., controlled atmosphere storage), have allowed sales in the Northern and Southern Hemispheres to overlap, leading to downward price pressure. While devastating to many farmers in certain regions, the lower level of prices has probably helped boost kiwifruit consumption around the world. In coming years the kiwifruit industry will focus efforts on balancing supplies with demand, while seeking adequate returns to growers. Part of the task will be to stimulate demand among both importing and exporting countries. This is crucial given the potential for production increases in coming years. The United States is a net importer of kiwifruit. U.S. exports of kiwifruit in 1995/96 are forecast to decline by 700 tons to total 8,800 tons.

Kiwifruit production and exports in 1995/96 are expected increase slightly

Selected country kiwifruit production in 1995/96 is forecast at 878,550 tons, less than 1 percent above last year's level. Exports in 1995/96 may reach 562,950 tons, up about 2 percent from the previous year. Higher exports from Chile and Italy are expected to more than offset lower shipments from New Zealand. Italy is the world's largest exporter of Kiwifruit, accounting for 38 percent of selected country exports in 1995/96. New Zealand and Chile are the next largest shippers accounting for 30 and 22 percent respectively. Chile's share of the export market is expected to continue its' expansion in 1995/96. This year Chile's market share is expected to reach 22 percent, up from 13 percent in 1992/93. This report updates information presented in our April 1995 publication (FHORT 5-95; pp 9-19). For 1995/96, Northern Hemisphere countries harvest Oct-Nov 1995, and Southern Hemisphere countries harvest Apr-Jun 1995.

NORTHERN HEMISPHERE

The European Union (EU) is the world's most important kiwifruit growing region. Italy accountes for over 80 percent of EU production. The EU greatly facilitated conversion of crop land to kiwifruit in the 1980s through widespread subsidies. Although most subsidies have reportedly been eliminated, their impact continues to be enormous. Estimated production in 1995/96 for selected EU countries is 426,950 tons, about 14 times the level estimated for the United States this season.

ITALY

Italy is the world's largest supplier of kiwifruit

Italy accounts for over half of total production from selected Northern Hemisphere countries in 1995/96. The 1995 crop is estimated at 290,000 tons, an increase of four percent from the previous year's output, despite poor weather conditions. As with other EU producers, Italy's entry into kiwifruit is comparatively recent, dating from the 1980s. During the last decade some of Italy's regional governments provided subsidies for planting alternative horticultural crops, including kiwifruit. However, these subsidies have been suspended to guard against over-planting. Area planted to kiwifruit has stabilized at 19,500 hectares, concentrated in the regions of Lazio (5,000 hectares), Emilia-Romaga (4,500 hectares), and Piedmont (4,500 hectares).

Kiwifruit consumption stagnant at about 105,000 tons

Kiwifruit consumption in Italy closely parallels production and prices. In general, the domestic market is very price-sensitive. The average per capita consumption is 1.8-2.0 kg. According to the Italian Kiwifruit Producers Association (CIK), almost all kiwifruit are sold on the fresh fruit market, but 20 percent of the population are not familiar with the fruit. EU quality standards of kiwis do not apply to the domestic market. Consequently, most low quality fruit is sold at the street markets at low prices. There is very little further processing, although small quantities are diverted to confectioners and frozen fruit juice manufacturers.

Italy's exports expected to recover in 1995/96 to a near record level

Italian kiwifruit exports are forecast at 213,000 tons in 1995/96, up 4 percent from last year's total of 205,000 tons. The following table shows Italy's meteoric rise as a producer with only limited exportable surplus of kiwifruit in the mid-1980s.

Italy's Meteoric Rise as Kiwifruit Producer (Calendar Year; Metric Tons)

Year	Area	Production	Exports	Imports
1986	8,969	55,000	11,000	4,000
1987	12,848	91,000	22,000	9,000
1988	15,926	124,000	45,000	12,000
1989	18,070	230,000	67,000	10,000
1990	19,758	275,000	108,000	13,000
1991	19,103	260,000	119,000	21,000
1992	20,000	374,000	169,000	19,000
1993	20,000	310,000	214,600	22,400
1994	19,500	280,000	205,000	28,000
1995	19,500	290,000	213,000	28,000

Source: USDA/FAS report IT5005; 1994 trade data estimated.

Given the overall stagnant demand for kiwifruit and the reportedly stable area planted, Italy is not likely to register huge gains in exports in coming years. Italy's primary export markets are other EU countries. In 1993, shipments to other EU destinations accounted for about 73 percent of total exports. Prospects remain good for shipments to EU markets during the peak Northern Hemisphere shipment period. Some competition from New Zealand and Chile occurs when high production leads to end of season stocks. The accession of Austria and Sweden into the EU should bolster Italy's earlier market development efforts there.

Italy imports in off-season

Despite its dominant position in export markets, Italy is also an importer of kiwifruit during the off season from May through October. Italy imported 28,000 tons of kiwifruit in 1994/95, and is expected to take the same quantity in the current marketing year. Chile and New Zealand are the major suppliers of imported kiwifruit to Italy. In view of the bipolar production season, Chile and New Zealand will remain the primary beneficiaries of import demand from Italy. However, the length of season in coming years could be affected by technological advances in controlled atmosphere storage and forced maturation.

FRANCE

France is the EC's second largest kiwifruit producer, with an estimated 77,000 tons harvested for 1995/96. Production this year is only marginally higher than last season's. Commercial production is estimated at 57,000 tons, 4,000 tons higher than last year's level. Much of the growth in total production over the last few years has been in the non-commercial sector. French kiwi production is described as not particularly profitable. This is due to world wide overproduction which has depressed prices and the devaluation of the Italian Lira which has increased competitiveness of imports from that country. French consumers' major complaint about domestically produced kiwis centers on the size of the fruit, which is inconsistent and tends to be smaller than imports from New Zealand and Italy. French Customs data show that the country is a net importer of kiwifruit, taking about half of total deliveries from other EU countries. However, imports from other EU suppliers (Italy) have been falling and Chile and New Zealand are competing for shares as France's largest off-season sources of kiwifruit. Much of the 2,000 ton increase in imports was supplied from New Zealand because of attractive lower prices. Imports from New Zealand nearly doubled while shipments from both Italy and Chile declined.

GREECE

Low profitability likely to restrict area expansion

Production in 1995/96 is estimated at 40,650 tons, down 4,300 tons from last year due to spring frosts. This year's reduced crop is of better quality than last year's. Conditions were such that the smaller number of fruit carried by the vines contributed overall to producing a better shaped large sized fruit. Kiwifruit production is centered in Western and Central Macedonia, particularly in the district of Pieria, which accounts for 1,900 hectares. Over the past few years, Greek growers have sustained marked declines in returns, which resulted in heavy losses. Much of the expansion in the last few years was carried out by individuals who do not farm for their primary source of income. These are professional people such as doctors and lawyers who have land and wanted to take advantage of an opportunity to obtain a substantial gain in a short period of time.

However, as prices declined and profits turned to losses these producers were forced to leave the business. In view of this, acreage is expected to level off around 4,000 hectares and not reach the previously MOA predicted level of 6,000 hectares. Nevertheless, because existing acreage has not reached full maturity, future harvests could reach 60,000 tons or more.

Greek exports forecast down in 1995/96 based on lower available supplies

Greek kiwifruit exports in 1995/96 are projected to fall to about 18,000 tons, down from last season's record of 21,000 tons. Through the start of December 1995, about 73 percent of Greek kiwifruit exports were shipped to EU member states, the balance went to markets in Eastern Europe.

Greece imports comparatively small quantities of kiwifruit in off-season

Greece imports only small quantities of kiwifruit, usually during July-September when locally produced kiwifruit are not available. Imports are forecast to reach about 700 tons in 1995/96. The import duty on kiwifruit from non-EU countries is generally 10.6 percent ad valorem. An 8 percent VAT is applied to the total CIF value plus import duties.

The Government of Greece, through regulation 2328/91 does not encourage new kiwi plantings. However it does provide assistance for improvements in established orchards. Currently there are no price supports for kiwifruit, and no subsidized producer credit is available.

PORTUGAL

Frosts continue to plague production

Production in 1995/96 is expected to decline again due to continued poor weather conditions. This year's crop is expected to be down eight percent from last year's level which was nine percent off the 1993/94 level. Despite these down turns, future production should increase, as about thirty percent of planted area reportedly has yet to bear fruit.

Fruit quality in 1995/96 is on average considered to be poor. The flavor of the fruit is not up to standard because some producers harvested and marketed the fruit too early and the sugar content is low. In order to avoid a lower grade classification and consequent lower prices much of this crop will be sold to middlemen, directly to consumers or at small agricultural country fairs.

Production is concentrated in the northern "Entre-Douro-e-Minho" region which alone accounts for sixty five percent of total output. The remainder of the kiwifruit is produced in the "Beria Litoral, Algarve, Beria Interior and Ribatejo/Oeste" regions. Virtually all of the production is controlled by five companies of which three control 65 percent of the total. The Government of Portugal provides a direct producer subsidy of 80,000 escudos/ha/year for orchards up to 10 hectares for a period of three years and 40 thousand escudos /ha/year for orchards between 10 and 20 hectares, also for a three year period. In addition the Government provided, in September 1995, disaster relief in the form of direct subsidies of 245/ECU/ha for orchards greater than 10 hectares when 35 to 65 percent of the planted area is damaged and 367 ECU/ha when more than 60 percent of the planted area is damaged.

Portugal is a net importer; declining prices have fueled demand

Consumer purchases of kiwifruit are influenced by prices and supplies of other fruit (apples in winter, bananas in summer). Appearance of fruit is reportedly an important factor influencing consumer purchases. Portugal is a net importer of kiwifruit and is expected to take 11,000 tons primarily from Italy, France, and New Zealand in the current year. In future years, however, imports are likely to stagnate at current levels or even decline as Portugal's domestic production picks up.

SPAIN

Spain's production of kiwifruit is small and no significant expansion in total area is expected in the near future. Galacia (northwestern Spain) is the primary production area accounting for about 50 percent of total planted area. Estimates for 1995/96 are 960 hectares planted, 810 hectares harvested, and 10,800 tons produced. The 1995 crop is reported to be of lower quality and smaller fruit size. The reduced size and quality of the crop is due to a cold and windy spring coupled with a hot early summer. Spanish farmers appear to have lost interest in producing this fruit because prices have declined drastically and yields have suffered as a consequence of bad weather.

Unless kiwifruit grower prices improve, there could some pulling of kiwifruit vines in areas of mixed production (kiwifruit/grapes) and replanting with grapes. Wine grapes reportedly offer growers better returns than kiwifruit at current prices.

Spain still offers incentives to kiwifruit producers

Some regional governments have set up an annual aid budget based on hectares of kiwifruit planted and start-up costs. Aid is based on whether the farmer is full-time or part-time, or is a member of a cooperative. Full-time cooperative members receive the highest share of assistance. Some regional governments offer subsidized loans at 3-4 percent below market interest rates to first-time kiwifruit farmers.

Spain's imports outstrip production by over four-fold

Spain is primarily an importer of kiwifruit. Imports in 1995/96 are expected to reach 48,500 tons, marginally lower (due to increased domestic production) than last year. Italy and France are the primary suppliers of kiwifruit to Spain, followed

by New Zealand and Chile. Local kiwifruit are marketed by only a few Galicia-based firms, mainly from November through February. Imports from Italy and France usually take place November through May, while fruit from Chile and New Zealand typically arrive June through December. Although a ban on U.S. fresh fruit was lifted in mid-1993, prospects for U.S. kiwifruit in this market are limited given strong competition from low-price EU neighbors during the export season.

JAPAN

Domestic production continues to decline and imports increase as lack of competitiveness erodes market share

Kiwifruit production in Japan for 1995/96 is estimated at 46,000 tons, a thirteen percent decline from the previous year, due in large part to a continued reduction in area. Planted area fell five and seven percent in the last two years These are the first declines ever registered for kiwifruit. This decline was triggered by continued saturation of the kiwifruit market due to stagnant consumer demand and the decreasing competitiveness of local product relative to imports. Over the long term, Japanese production is not expected to reach the government's goal of 83,000 tons by the end of the century.

Japan is forecast to import 54,000 tons of kiwifruit in 1994/95, up from the preceding year in response to lower domestic supplies. Imports come primarily from New Zealand, in large part due to its complementary season and proximity. Chilean kiwifruit has again dramatically increased its share of the market. Chilean January/October 1995 shipments are nearly double from the CY 1994 level due to its attractive price compared to imports from New Zealand. New Zealand currently enjoys a 73 percent share of the import market. Interest in U.S. kiwifruit is usually limited, as it competes directly with local Japanese production. According to industry sources, Japan's future demand for kiwifruit is not likely to exceed 100,000 tons, split evenly between local production and imports.

Japanese Imports of Kiwifruit by Origin (Metric Tons)

Supplier	1993	1994	1995 (Jan-Oct)
United States	289	217	236
New Zealand	43,082	39,567	28,680
Chile	3,687	5,728	10,841
TOTAL	47,058	45,511	39,552

Source: Customs Bureau, Ministry of Finance (USDA/FAS report JA6002)

Average Import Prices of Kiwifruit by Origin (Yen per Kilogram, CIF 1/)

Supplier	1993	1994	1995 (Jan-Oct)
United States	202	271	236
New Zealand	211	121	115
Chile	131	218	209

Source: Customs Bureau, Ministry of Finance (USDA/FAS report JA6002)
1/ Average exchange rates (yen to one U.S. dollar): 1993=112; 1994=103; 1995=92.

KOREA

Domestic production projected to reach 15,000 tons by year 2000

Domestic production of kiwifruit in 1995 is estimated at 10,000 tons, up fourteen percent from the previous year. By the year 2000 domestic production is projected to be 15,000 tons. Korea's producing sector is characterized by low productivity, and inefficient operation caused by small-scale farming. Approximately 5,000 farm households cultivate all of the 1,400 hectares in production. Most of the growers are older farmers who consider kiwifruit production secondary to growing rice. Nevertheless, the Ministry of Agriculture, Forestry and Fisheries (MAFF) is trying to support serious domestic growers. The policy is to 1) expand demand and 2) improve the competitiveness of domestic producers. To implement this policy the government has increased financial support for introducing improved production methods, installation of modern storage and packaging facilities and the installation of anti-wind nets.

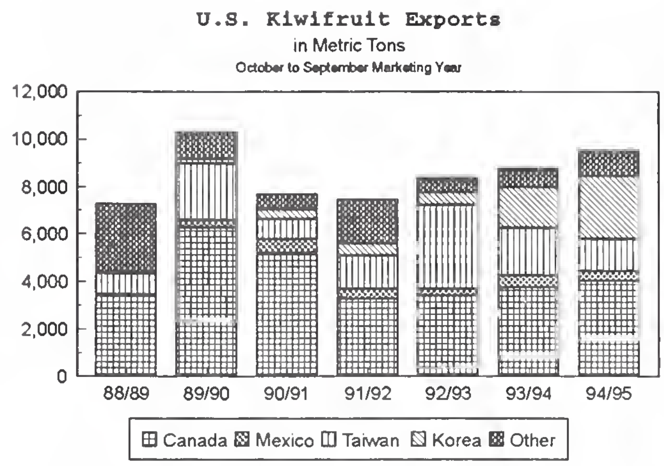
This latter project is funded for three years at $12.5 million and hopes to provide cover for 100 hectares.

Consumption continues to rise

Since 1990, consumption has increased by more than ten percent annually rising from 6,000 tons to over 15,000 tons. Hotels and restaurants account for about fifty percent of total consumption. Twenty percent of the domestically produced fruit is processed into juice and products for use in the bakery and confectionery sector. Virtually all of the imported fruit is consumed fresh.

Import barriers hamper shipments from the U.S.

Korea reduced its tariff on kiwifruit to 49.5 percent in 1990. Since that time imports have grown at a steady and modest rate. The two primary suppliers are the United States and New Zealand. Projected imports from these countries in 1996 are 2,600 and 2,700 tons respectively. Imports from the U.S. are up by 1,000 tons while those from New Zealand are constant. The U.S. market share of total consumption has increased from 7 percent in 1993 to 17 percent in 1995. U.S. supplied fruit has made these gains despite having to compete directly with domestic fruit, with an extended New Zealand marketing period, higher prices in the retail market, unsubstantiated food safety scares and restrictive import inspection procedures. Early in the marketing year California packers were forced to discard shipping fruit in pinewood crates due to concerns by the National Plant Quarantine Service (NPQS) over the introduction of the pine wood nematode. Fortunately, the shippers were able to find alternative packaging materials so that sales were not unduly disrupted. Later in the marketing year, the NPQS repeatedly ordered fumigation of U.S. containers to prevent the introduction of alleged "non-cosmopolitan pests" the privet mite and the Brevipalpus lewisi. The fumigation problem became serious enough that some importers considered canceling future orders due to financial loses incurred by repeated fumigation.



UNITED STATES

The U.S. commercial kiwifruit industry is based around Gridley, in northern California. Kiwifruit production in 1995/96 is estimated at 31,600 tons, a 11-percent decline from the previous year. This year's decline is due to warm, wet weather during the pollination period. The quality of U.S. fruit is good and fruit sizes are larger than normal. U.S. producers ship small sized fruit to Canada, medium sized fruit to domestic markets, and large sized fruit to Asian markets.

Canada, Korea and Taiwan are major export markets

Total U.S. exports of kiwifruit during 1994/95 reached 9,505 tons, an increase of about eight percent over the previous year. The value of exports in 1994/95 was approximately $13.1 million, the same as last season's level. Among the major markets for U.S. kiwifruit are Canada, Taiwan, and Korea, which collectively accounted for slightly more than 88 percent of total exports in 1994/95. U.S. exports to Taiwan continue to decline in response to lower priced, French kiwifruit which continues to be valued at $1-$2 per tray below U.S. kiwifruit. The Korean market is the key success story for the United States. Exports which had grown almost 10-fold over the

past five years, doubled from the 1993/94 level to total 2,659 tons valued at $4.3 in 1994/95. Current marketing season shipments to Korea started slowly but picked up in January. It appears that exports to Korea will be close to last year's record. Shipments to Korea could grow if phytosanitary issues and related customs clearing procedures are resolved. However, U.S. kiwifruit exports to all destinations in 1995/96 are forecast to decrease to 8,800 tons due to the smaller crop.

Approximately 80 percent of all U.S. kiwifruit marketed during 1994/95 were consumed domestically.

The Canadian market for U.S. kiwifruit shows signs of recovery

Exports to Canada continued to recover. Exports hit $4.9 million up $400,000 from the previous year's. The California Kiwifruit Commission (CKC) has faced one of its toughest battles in Canada. Since 1989, cheaper Italian, Greek and French fruit has flooded California's traditional markets in central Canada. Over the past four years this stiff competition has contributed to a 50-percent drop in U.S. exports to Canada. Last year U.S. shippers had a one and one half month shipping window to the central Canadian market, but his year that window was closed by early arrivals of low priced European fruit. The CKC responded by shifting focus to western Canada, where California has a geographic advantage. This year however, U.S. exports to Canada should decline in part because of the total collapse of the eastern Canadian market but also as a result of the lower U.S. crop containing a smaller percentage of small sized fruit which the Canadians prefer.

The United States is a net importer of Kiwifruit

Imports usually begin in April and end in October when the U.S. crop is harvested. However, improved cold storage technology in major supplying countries has greatly extended the shipping season. This has caused some concern in producing countries, as there is some possibility for pressuring prices downward when old-crop imports compete with new-crop domestic fruit. Chile has emerged as the leading supplier of kiwifruit to the U.S. market since the anti-dumping action against New Zealand was implemented in 1992. The following table shows the development of U.S. imports over the past five years. Italy the world's largest producer and exporter, has established a small but expanding market in the United States. Italy's kiwifruit competes directly with U.S. domestic production, as imports begin arriving in November.

United States Kiwifruit Imports Resume Growth
(Oct/Sep Year; Metric Tons)

Supplier	1990/91	1991/92	1992/93	1993/94	1994/95
Chile	3,098	12,311	19,444	24,831	33,528
N.Z.	27,888	7,801	4,672	3,414	2,617
Italy	296	59	675	1,049	411
Others 1/	32	0	0	42	2
TOTAL	**31,314**	**20,171**	**24,791**	**29,335**	**36,558**

Source: U.S. Bureau of Census data. Totals may not add due to rounding.
1/ Others includes small quantities from Canada, .

According to U.S. Census data, the average value of imported Italian kiwifruit was $0.70 per kilogram during October 1994 through February 1995. In contrast, the average 1993/94 import value of New Zealand kiwifruit was $0.82 per kilogram and the average for Chilean fruit was $0.56 per kilogram.

Dumping margin on New Zealand kiwifruit reduced after first administrative review. Second review due in March

The U.S. Commerce Department's determination of injury to the U.S. domestic kiwifruit industry from imports of New Zealand kiwifruit led to the imposition of a 98.6 percent anti-dumping duty in May 1992. The dramatic decline in imports from New Zealand from 1991/92 through 1993/94 is a direct consequence. However, the downward trend could be affected by the final results of the first administrative review, which covered the period November 27, 1991, through May 31, 1993. The dumping margin has been revised downward to 10.18 percent.

The U.S. Customs Service requires a cash deposit or bond equal to the dumping margin on all imports

of kiwifruit from New Zealand. A second review should be made public in March 1996. Depending on the finding of this review excess deposits may be refunded and additional deposits may be demanded for the period covered by the first review. The second review may also determine if the anti-dumping duty should remain in effect.

SOUTHERN HEMISPHERE COUNTRIES

The Southern Hemisphere kiwifruit industry is centered in New Zealand and Chile. Australia, by comparison, is a very small kiwifruit producer. Collectively, these suppliers account for about 364,000 tons or 41 percent of world production.

NEW ZEALAND

New Zealand continues as the dominant supplier in the Southern Hemisphere

Kiwifruit production for 1995/96 is forecast to decline six percent to 198,000 tons, due in large part to frost damage during theflowering period. Poor conditions affected 57 percent of the growers in the Bay of Plenty causing crop loses averaging 17 percent. Nevertheless, late spring and summer weather was good and helped produce a fruit crop of excellent quality and larger than normal size. This year large fruit accounted for 40 percent of the crop, up from the usual 25 percent.

The Kiwifruit Marketing Board's policies continue to address expanding world production and declining prices

With world production increasing and prices declining the Kiwifruit Marketing Board has sought to improve quality and reduce production. The Kiwifruit Marketing Board (KMB) has employed two strategies designed to limit the volume of fruit marketed: 1) the grower-financed vine pull scheme; and, 2) crop management policy. The KMB's crop management policy emphasizes production (packed volume) targets that are based on demand from export markets. Packhouses are responsible for determining which grower's fruit not to pick, or which fruit to pick and then store in field bins. The KMB then pays these selected growers the net amount (after picking and packaging costs) it pays to other growers. The KMB would like to have 50-55 million trays for marketing each year. Current forecast for the 1996 crop suggests an export availability of 55 million trays.

The New Zealand Kiwi Board has saved N.Z. $1.8 million by organizing its marketing and storage programs to extend the packing season and reduce the amount of fruit repacked. Early sales consist of varieties which do not store well. The bulk of the remaining fruit is stored in field bins and then packed as required later in the season. The board envisions holding eight to ten million trays of fruit in conventional storage next season, with 5 million trays stored in controlled atmosphere (CA).

KMB returns to growers lower

Because of the earlier than expected debt repayment, growers are starting the season with a clean slate. Growers will receive payments in full for all fruit sold less marketing, packaging and other expenses. Returns for 1995 are sixteen percent lower than in 1994 due to a late and large crop, and increased quantities of Chilean fruit.

New Zealand Kiwifruit Prices
($NZ/tray = $NZ/3.6 kg)

	1992	1993	1994	1995	1996
NZ$/tray farm gate	3.85	4.18	4.79	4.01	4.00
NZ$/tray KMB receipts	2.65	5.32	4.91	4.01	4.00

Source: FAS/Wellington and New Zealand KMB data
1/ For 1992, the NZ$3.85 farm gate price was supplemented by $1.20 of commercial KMB debt, subsequently repaid in 1993 and 1994. Note: 1993 data are preliminary. Data based on trays submitted, not trays sold.

KMB continues to exercise monopoly control over exports, but for how long?

New Zealand is the second largest exporter of kiwifruit after Italy. The KMB exercises control over export sales to all markets except Australia, which usually takes Grade II kiwifruit. Export trade is dominated by shipments to EU countries, with

smaller amounts going to Japan, Canada and Taiwan. Collectively, the four largest markets account for about 72 percent of total exports in 1994/95. Exports in 1995/96 are forecast at 170,000 tons, down about six percent from last year and well below the 203,000 ton level recorded in 1991/92. Part of the decline is attributable to lower sales to the EU stemming from higher domestic production and lower prices in Europe.

New Zealand holds thirty percent of the international kiwifruit market. Exports to Asian markets started strongly despite competition from Chilean fruit and disruptions from Class II fruit reexported from Australia at lower prices than Class I fruit. The Board is attempting to develop new markets in Ho Chi Minh City, Vietnam; Vladivostock; and Dubai.

The KMB has been under intense scrutiny since the disastrous 1992 season. The Kiwifruit Industry Marketing Review Committee was established by the Minister of Agriculture to guide future policy decisions regarding the KMB. A report submitted to the committee in October 1994 contained four points: 1) investment in the KMB from both growers and others should be allowed; 2) a retailing strategy to promote a differentiated brand direct to consumers should be initiated; 3) retain the KMB's monopoly on exports, but with a sunset clause in the future; and 4) begin joint-venture marketing arrangements to consolidate activities (possibly with the Apple and Pear Marketing Board).

This report received a mixed review by the industry. The NZ Kiwifruit Growers Incorporated supported most of the findings but the large corporate growers, Integrated Kiwifruit Services, stated that the report was of poor quality, lacking strategic vision, and empirical evidence.

CHILE

Production continues to increase

Kiwifruit production in Chile in 1995 reached 144,500 tons up twenty five percent from 1994 and 1996 production is forecast at a record 160,000 tons, up eleven percent from the previous year. Production is expected to continue to expand as previous year's plantings reach mature yield stages. Planted area is expected to level off in 1997 at about 9,500 hectares and production should stabilize at about 165,000 tons, rather than the previously estimated 130,000 tons. This reduction in growth is a result of general decline in world prices and a consequent negative return experience by for marginal producers over the last three years.

Chile hopes to boost export sales through new Export Promotion Fund

Chile is primarily a kiwifruit exporter, with about three-quarters of total commercial production entering export channels in 1995/96. Shipments in 1995/96 are forecast at 125,000 tons, an increase of thirteen percent. Export sales in 1995 were aided by a new government-backed program, the $10-million Export Promotion Fund (EPF). The fund is managed by the Chilean Government's export promotion agency, ProChile, and is overseen by an advisory committee with public and private sector representatives. ProChile plans to continue the EPF for at least five years and spend about $10 million per year

Chile's major markets are the EU, the United States, Argentina, and Brazil. Traditionally, Chile's export efforts have focused on the EU, although demand is now somewhat diminished as domestic EU production continues to flourish. However, shipments to the United States have expanded rapidly, partly in response to the competitive advantage provided Chile by U.S. anti-dumping duties assessed against New Zealand. Indeed, the United States is now the single largest destination for Chilean kiwifruit. Shipments to the U.S. reached 33,316 tons in 1995 compared to 26,129 in 1994.

Although Chile's exports to Argentina declined slightly by about 1,000 tons to total 13,666 tons, shipments to Brazil jumped from 6,200 tons to 17,000 tons. Exports to the European Union rose by 4,200 tons representing a 15 percent increase.

Export prices in 1995 fell two percent, from $682 to $668 per tons. The Kiwi Producers Association expects prices to fall further unless exports are subject to stricter quality controls.

AUSTRALIA

Australian kiwifruit production in 1995/96 is projected to reach 6,000 tons, up 33 percent from last year's drought-reduced crop. Last year's extremely dry conditions produced not only a smaller crop but also a high ratio of small fruit. Consequently, much of last year's crop was unsuitable for commercial use. This season's crop is expected to be very good due to timely rain during the spring and summer growing season. Production of kiwifruit expanded rapidly in Australia in the 1980s, from 500 tons in 1982/83 to 9,500 tons in 1987/88. However, this expansion led to a serious oversupply situation and plummeting prices. Several large operations pulled vines and ceased production in 1989, resulting in a 46-percent decline in planted area. Since 1988/89, planted area declined from 1,128 hectares to about 450 hectares. Production, however, has steadily increased due to higher yields from maturing vines. Very few new plantings have taken place in the last few years, and now bearing area accounts for 92 percent of the total area planted. Australian kiwifruit production is concentrated in the states of Victoria, New South Wales, and Queensland. Kiwifruit are harvested from March through May.

Australian consumers demand for high quality fruit keeps imports strong

Australia continues to import more than twice as much kiwifruit as it produces. Domestic consumption has stabilized between 16,500 to 17,000 tons. Imports are running around 12,500 tons. Imports will continue to be strong as consumers have linked fruit size to quality. This means that undersized Australian fruit which reflects unfavorable soil and growing conditions does not compare well with the imported product. New Zealand continues to dominate the imported kiwifruit market.

Australia exports small quantities of kiwifruit to regional markets

Australia exports small amounts of kiwifruit, forecast at 1,000 tons in 1994/95. While Australia has limited early season advantage over New Zealand, prospects for kiwifruit exports are dampened by strong competition from countries such as Chile and the EU producer countries. A lack of direct shipping routes to potential Southeast Asian markets (e.g., Singapore) adds costs and hampers development of regional export markets. Thus, Australia is likely to remain a low-volume exporter.

For further information on supply, distribution, and trade, contact Robert Knapp, 202-720-6877. For information on production, contact Kelly Kirby Strzelecki at 202-720-6791.

KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES
Marketing Years 1991/92-1995/96

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
NORTHERN HEMISPHERE 1/					
Italy	1991/92	21,000	309,000	119,000	21,000
	1992/93	20,000	374,000	229,098	19,051
	1993/94	20,000	310,000	214,000	22,400
	1994/95	19,500	280,000	205,000	28,000
	1995/96	19,500	290,000	213,000	28,000
France	1991/92	5,280	58,600	22,100	31,308
	1992/93	5,180	79,400	28,002	34,331
	1993/94	5,070	71,700	24,759	25,214
	1994/95	4,800	78,000	23,083	27,119
	1995/96	5,000	77,000	25,000	25,000
Greece	1991/92	4,053	29,700	13,830	876
	1992/93	4,063	46,600	19,393	445
	1993/94	3,990	39,422	24,214	784
	1994/95	3,950	44,970	21,000	750
	1995/96	3,900	40,650	18,000	700
Spain	1991/92	n/a	n/a	664	37,084
	1992/93	891	9,300	1,880	47,658
	1993/94	954	11,230	1,650	44,460
	1994/95	960	9,000	1,500	47,000
	1995/96	960	10,800	1,700	48,500
Portugal	1991/92	1,050	5,000	401	8,863
	1992/93	1,059	10,100	528	11,765
	1993/94	1,059	10,098	528	11,765
	1994/95	1,105	9,191	85	8,397
	1995/96	1,105	8,500	450	11,000
Japan	1991/92	5,000	45,000	0	42,651
	1992/93	4,950	53,800	0	47,854
	1993/94	4,720	52,100	0	45,282
	1994/95	4,440	52,900	0	47,779
	1995/96	4,150	46,000	0	54,000

KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES, cont.
Marketing Years 1991/92-1995/96

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
Korea	1991/92	na	na	na	na
	1992/93	na	na	na	na
	1993/94	1,131	8,500	0	3,588
	1994/95	1,379	8,700	0	4,446
	1995/96	1,400	10,000	0	4,081
United States	1991/92	2,955	26,900	7,485	20,171
	1992/93	2,954	47,400	8,359	24,791
	1993/94	2,914	44,600	8,749	29,334
	1994/95	2,792	35,700	9,505	36,558
	1995/96	2,752	31,600	8,800	39,200
Subtotal Northern Hemisphere					
	1991/92	n/a	n/a	163,480	161,953
	1992/93	39,097	620,600	287,260	185,895
	1993/94	38,839	547,650	273,900	182,827
	1994/95	38,926	518,461	260,173	200,049
	1995/96	38,767	514,550	266,950	210,481
SOUTHERN HEMISPHERE 2/					
New Zealand	1991/92	14,594	275,100	203,000	0
	1992/93	14,000	226,000	191,000	0
	1993/94	13,268	221,000	178,000	0
	1994/95	13,117	210,000	180,000	0
	1995/96	13,070	198,000	170,000	0
Chile	1991/92	12,560	99,500	66,410	0
	1992/93	12,770	111,000	75,365	0
	1993/94	11,500	115,500	85,000	0
	1994/95	10,040	144,000	111,000	0
	1995/96	9,545	160,000	125,000	0

KIWIFRUIT PRODUCTION AND TRADE IN SELECTED COUNTRIES, cont.
Marketing Years 1991/92-1995/96

COUNTRY	YEAR	PLANTED AREA	PRODUCTION	EXPORTS	IMPORTS
Australia	1991/92	n/a	n/a	n/a	n/a
	1992/93	437	6,000	1,012	14,056
	1993/94	451	5,500	1,084	12,022
	1994/95	450	4,500	800	13,200
	1995/96	450	6,000	1,000	12,000
Subtotal Southern Hemisphere					
	1991/92	n/a	n/a	n/a	n/a
	1992/93	27,207	343,000	267,377	14,056
	1993/94	25,219	342,000	264,084	12,022
	1994/95	23,607	358,500	291,800	13,200
	1995/96	23,065	364,000	296,000	12,000
TOTAL	1991/92	n/a	n/a	n/a	n/a
	1992/93	66,304	848,800	554,637	199,951
	1993/94	64,057	889,650	537,984	194,841
	1994/95	62,533	876,961	551,973	213,249
	1995/96	61,832	878,550	562,950	222,481

Note: Production data for Northern Hemisphere countries are estimates; for Southern Hemisphere countries, forecasts.
1/ For Northern Hemisphere countries, data refer to crops harvested in the first half of the split-year(mostly in October-November) and marketed in the second half of the split year (December-May).
2/ For Southern Hemisphere countries, data refer to crops harvested and marketed in the second half of the split-year.
Source: USDA/FAS attache reports; USDA, National Agricultural Statistics Service; and, U.S. Department of Commerce, Bureau of Census.

Review of World Banana Trade Situation in Selected Countries and the European Banana Regime

This article reviews and highlights key developments that have occurred over the past several months regarding the European Union's (EU) banana regime and its effects on key world suppliers and markets. Also, this article takes a brief look at the situation of the banana industries in the four Latin American countries (Colombia, Costa Rica, Venezuela, and Nicaragua) that signed the framework agreement with the EU. Additional details concerning the EU's Banana Regime and the Framework Agreement can be obtained in the February 1995 issue of World Horticultural Trade and U.S. Export Opportunities.

Review on total world banana production

According to the Food and Agriculture Organization of the United Nations (FAO), total world banana production in 1994 totaled 52,584 million metric tons, up one percent from 1993. Based on the FAO production data, total world banana production increases about one percent each year. Production data for 1995 were not available.

World trade situation and review of the EU banana regime

The United States and the European Union are the world's largest importers of bananas, respectively, importing about 3.5 and 4.0 million metric tons of fresh bananas annually. Together, these two world regions account for about two-thirds of the world banana trade. According to the FAO Intergovernmental Group report on bananas, the world's largest market for bananas, the EU, has become more predictable on the volume of bananas it imports due to the restrictions under the new banana trade regime. FAO estimates that until 1997 no significant adjustment--apart from that necessary to accommodate the 3 new member states--will be made in addition to the tariff quotas of 2.2 million metric tons for Latin American exporters, 854,000 tons for EU suppliers, 797,700 tons for African, Caribbean, and Pacific (ACP) suppliers effective from January 1, 1995. However, since the accession of Austria, Finland, and Sweden to the EU, an additional volume of 353,000 metric tons (outside 92/404--the quota) will be imported into the EU to accommodate the former EFTA-3 countries also effective from January 1, 1995. Thus, the total EU quota for 1996 has been increased by 353,000 tons to 2,553,000 tons to include the former EFTA-3 countries. The FAO report projects the world demand for bananas will grow about 1.3 percent annually, from 10.3 million tons in 1993 to 10.8 millions by 1997.

Production and trade situation in Framework Countries

In **Honduras**, the banana industry is of paramount importance to the Honduran economy. According to the U.S. Agricultural Attache, banana production in Honduras in 1995 totaled 624,000 tons, up 11 percent from 1994. In 1995, exports accounted for about 87 percent of total production. Historically, bananas have been Honduras' chief export crop. However, since 1994 coffee has become the number one export

item. Prior to the EU's import quotas, Honduras exported nearly half of its bananas to Europe, but since the regime, approximately 85 percent of its banana exports have been directed to the United States with only about 15 percent going to Europe.

Production and exports of bananas in Honduras are dominated by two American firms, Chiquita and Dole. Fyffes, a British company, also purchases and exports a small amount of bananas from independent producers.

Labor and land disputes, outbreaks of sigatoka disease, unfavorable weather, the EU's restrictive import regime, and declining export prices have all had a detrimental impact on banana production in recent years. Even though Honduras is a producer of high quality bananas, it is also considered a high cost producer. The production cost of a 40 pound box of bananas is approximately US$5.50 F.O.B. Honduras. The Government of Honduras has maintained a US$0.50 per 40 pound box export tax on bananas, even though other countries have reduced or eliminated taxes to make their bananas more competitive. In a bold attempt to stall rapid divestment by multinational banana companies, Honduras, in April of 1995, eliminated the export tax for bananas produced in new or rehabilitated plantations.

In **Venezuela**, approximately 95 percent of the bananas produced are for domestic consumption. In 1995, banana production totaled about 950,000 tons, down 5 percent from the previous year. In the early 1990's, three Venezuelan companies, Fruetera del Lago, Kaminca and Kambuca, began producing bananas for the export market. However, in mid-1994, Fruetera del Lago and Kaminca went bankrupt when the country went into an economic recession. The loss of these two companies, reportedly, seriously affected Venezuela's ability to meet its EU banana quota volume (44,000 tons or 2 percent of total EU's quota). In 1994, Venezuela along with Colombia, Costa Rica and Nicaragua, signed a 2.1 million ton and 2.2 million ton framework quota agreement for 1995 with the EU.

Venezuela transfers part of its EU quota volumes

In September 1995, Venezuela--to avoid losing its quota--transferred 65 percent (28,600 tons) of its 1995 EU quota to three Colombian companies that will use the transferred quota rights to export Colombian bananas.

During the same month in 1995, Dole signed an agreement with the Venezuelan Trade Institute (ICE) by which it will invest $1.5 million in the Venezuelan banana sector in exchange for 10,000 tons of the Venezuelan 1995 EU quota. Also, during the same period, Chiquita and Trujillana Fruit One, a Venezuelan company, signed similar agreements with ICE. Chiquita will invest $1.2 million in exchange for 8,000 tons of quota, and Trujillana will invest $750,000 to get Kaminca back into production in exchange for 5,000 metric tons of the EU banana quota. These investments must be made by September 1996. The quota amounts are estimates because ICE has not released copies of the agreements.

In **Colombia**, approximately 86 percent of the annual banana production is slated for the export market. In 1995, Colombia's total banana production was estimated at 1.7 million metric tons, of which 1.5 million tons went for export, and 242,000 tons were used for domestic consumption. Bananas for domestic consumption are grown on small farms throughout Colombia, using traditional production methods. Bananas for the export market are grown on medium to large plantations in two regions on the Atlantic coast side, Uraba and Santa Marta. At the beginning of the 1980's, 90 percent of all export bananas were produced in Uraba region. However, the importance of Uraba has been declining and in 1994 it accounted for only about 65 percent of Colombia's export production with the balance being produced near Santa Marta.

According to the Colombian Banana Growers Association **(AUGURA)**, the production cost of a 40 pound box of bananas was US$4.40 in 1995. In January 1995, the Colombian government established an export license fee of US$2.50 per

40 pound box of bananas exported to the EU. This fee goes to a special fund and out of it all export banana growers receive a payment of US$0.50 per box of bananas exported to any country. *Payment of this fee is compulsory.*

Colombia was allocated 21 percent of the total EU quota (441,000 of the 2.1 million ton quota in 1994 and 462,000 tons of the 2.2 million ton quota in 1995). Total EU quota for Colombia in 1996 has been increased by 74,130 tons or 21 percent of the 353,000 tons (outside Directive 92/404 quota volume) allowed into the EU for Austria, Finland and Sweden. This increased quota amount brings Colombia's total EU quota volume to 536,130 metric tons. Colombia exported 100 percent of its 1994 EU quota and is estimated to have done the same in 1995. The EU import quota represented 47 percent of Colombia's banana exports in 1994. Traditionally, the largest buyer of Colombian bananas has been the United States, but its share has been declining in recent years as Colombia expands to other markets.

According to AUGURA, the Colombian banana industry continues to suffer financially because of a decline in world banana prices in 1993-94, restrictions imposed by the EU on banana imports from Latin America, Colombian peso revaluation, high inflation and social unrest, mainly in the principal export banana producing area of Uraba.

The third largest Colombian banana exporter (after Uniban and Proban), Banacol, has been in financial difficulties since 1990 and finally, in August 1995, its creditors reportedly agreed to a restructuring of all of its debts. Banacol is both a Colombian banana exporter and an EU importer.

According to the U.S. Agricultural Attache in **Costa Rica**, production of bananas in 1994 totaled 1.9 million tons on 52,737 hectares, 3,343 hectares more than in 1993. Almost all of Costa Rica's banana production is slated for the export market. Of the total area, about 95 percent is planted in the Atlantic region of the country with the majority of production occurring in Pococi and Matina. In 1994, yield per hectare declined to 1,960 boxes (35 tons) from 2,046 boxes (37 tons) in 1993, the lowest level in the last 10 years. The reduction in export volumes was caused by the EU implementation of import quotas and a high occurrence of black sigatoka--which in some cases made it necessary to eliminate whole plantations. In 1994, one hectare of bananas in Costa Rica, yielding two thousand 40 pound boxes per hectare, had a cost of about US$1.66 per box.

In 1994, export of bananas from Costa Rica totaled 1.9 million metric tons valued at US$528 million, down 1 percent in value from the previous year. Also, during the same period exports of bananas to the EU accounted for about 53 percent of total shipments, followed by the United States with 46 percent and the balance being shipped to Asia.

Marketing of Costa Rican bananas are done primarily by four companies: Standard Fruit Company, 25.5 percent; Banana Development Company, 19.5 percent; Compania Bananera Atlantica Ltd., 17 percent; BACORI, 6; and the remaining 32 percent by Difrusa, Geest Caribbean, Sunisa and others.

Banana imports into the United States up

During the first 11 months of calendar year 1995, U.S. imports of fresh bananas totaled 3.4 million metric tons, down only 1 percent from the record level set during the same period a year ago. U.S. imports of fresh bananas in 1994 reached a record level of 3.7 million tons, up 6 percent from a year earlier. Fresh bananas imported into the United States from 1990 to 1994 increased about 19 percent, mainly as a result of increased demand and some diversion of banana supplies from European Union (EU) markets to the United States by Latin American and other producing countries from 1993 to 1994. Traditionally, Latin American countries supply the bulk of U.S. banana imports. In 1994, Costa Rica--the U.S. number one supplier, exported nearly 1.0 million metric tons of bananas to the United States, up 6 percent from 1993. Although, based on the current U.S. banana import trends, its appears unlikely that calendar year 1995 banana imports from Costa

Rica and other U.S. major suppliers will exceed 1994's level. With the exception of Mexico, U.S. imports of bananas from all other major suppliers registered increases in 1994.

CHRONOLOGY ON U.S. BANANA 301 ACTIONS AND ISSUES IN 1994 AND 1995 DESCRIBED AS FOLLOWS:

Issues and items in 1994

August 18: Twelve U.S. Senators write to USTR urging a 301 investigation of the EU's banana import policy and the Framework Agreement on Bananas.

September 2: Fifty U.S. Representatives write to USTR urging a 301 investigation of the EU's banana import policy and the Framework Agreement on bananas.

September 2: 301 petition submitted to USTR by Chiquita Brands International, Inc. and the Hawaii Banana Industry Association pursuant to section 302 (a) of the Trade Act alleging that various policies and practices of the EU, Colombia, Costa Rica, Nicaragua and Venezuela concerning trade in bananas are discriminatory, unreasonable, and burden or restrict United States commerce. In particular, the petition alleged that the March 29, 1994 Framework Agreement on Bananas between the EU and Colombia, Costa Rica, Nicaragua and Venezuela (Framework Agreement) aggravated the harm caused by the EU banana import regime and provided for the implementation of discriminatory measures against the U.S. banana companies operating in Latin American countries.

The basic elements of the Framework Agreement are: country-specific allocations of the EU's TRQ provided to Colombia, Costa Rica, Nicaragua and Venezuela; and export licenses permitted to be required for "up to" 70 percent of EU imports of Category A operators (mainly U.S. firms) from each Framework Agreement country.

October 17: USTR accepts 301 petition as to EU and notifies Costa Rica and Colombia that if they implement the Framework Agreement, an investigation will be initiated against those governments as well. USTR requests consultations with the EU. See *Federal Register* of October 24, 1994 (59 Fed. Reg. 53495). USTR assigns docket number 301-94 to EU investigation.

November 14-15: Consultations are held with the EU in Brussels.

November 17: Deadline for submission of written comments by interested parties on the initiation of the Section 301 investigation against the EU.

December 1: Colombia implements the Framework Agreement, substantially increasing discrimination and trade disruption against U.S. interests.

December 27: Costa Rica implements the Framework Agreement.

Issues and items in 1995

January 1, 1995: EU Banana Regime Transitional Regulations (outside Directive 92/404) authorizes a separate banana import quota for the former EFTA-3 countries.

The current EU regime, as described in 92/404 and related regulations, was adopted by the European Union in 1992, prior to the accession of Austria, Finland, and Sweden to the European Union on January 1, 1995. Since accession, imports of bananas from these three new EU members states have been subject to transitional regulations (outside Directive 92/404) which established a separate banana import quota of 353,000 metric tons annually for the former EFTA-3.

Bananas imported into the former EFTA-3 under the transitional regulations have been allocated to the traditional importers of bananas into these countries, which for the most part are large, multinational (mainly U.S. based) banana companies importing Latin American bananas.

This allocation of licenses is substantially different than the allocation would be if the 353,000 metric ton volume for Sweden, Finland, and Austria were under directive 92/404, which would at a minimum allocate 30 percent of the licenses for that volume to so-called "Category B" operators (traditional importers of ACP and/or EU bananas, e.g., ***European and like firms*** *that had virtually no history of importing bananas from third country sources*).

Category B licenses are for the import of Latin American bananas. Such licenses in effect transfer the "quota rent" associated with the import of a Latin American banana into the EU to the license holder. The allocation of Category B licenses are ***linked*** to a firm's historical imports of ACP and/or EU bananas based on a rolling three-year average into the EU. According to the EU commission authorities, the quota rents associated with the Category B licenses, serves as economic incentives for firms to continue to import ACP bananas into the EU.

Reportedly, the allocation under the transitional regulations of all of the licenses for imports into the former EFTA-3 to historic importers of Latin American bananas has been based upon the rationale that ACP bananas have historically not been, and continue not to be, imported into Sweden, Austria, and Finland. As such, any allocation of additional Category B licenses as a consequence of the EFTA-3 import volumes: 1) Is not needed to maintain historical levels of imports of ACP bananas into the European Union, and 2) Thus would constitute a windfall for ACP banana importers.

January 9: (1) USTR inititates 301 investigation of the banana export practices of Costa Rica and Colombia, including their implementation of the Framework Agreement, and Mr. Kantor indicates that he "will proceed expeditiously. . . and will not hesitate to take action to address unfair practices that harm U.S. commerce."

(2) USTR makes a preliminary decision that the EU's banana import regime is adversely affecting U.S. economic interests by causing hundreds of million of dollars of harm to U.S. interests "at a minimum."

(3) USTR repeats warning to Nicaragua and Venezuela that it will initiate 301 investigations against those countries if they implement the Framework Agreement. The public is asked to comment on retaliatory sanctions that may have to be taken if relief is not achieved. See USTR press release of January 9, 1995 and January 13, 1995 *Federal Register* notice (60 Fed. Reg. 3283). USTR assigns docket number 301-96 to the investigation of Colombia and docket number 301-97 to the investigation of Costa Rica.

January 9: The German High Finance Court upheld an earlier decision of the Hamburg Customs Court which had exempted a German fruit importer from paying of a bond to cover tariffs owed under the EU's banana regulation for imports of non-licensed dollar bananas. The Court argued that Germany is committed to binding international agreements, i.e. GATT/WTO regulations which pre-date the EU banana treaty. According the German officials, the decision undermines the entire EU banana regime and puts further pressure on the EU Commission to revise its banana policy, which discriminates against dollar bananas in favor of bananas from former EU colonies in the African, Caribbean, and Pacific regions. The European Court of Justice (ECJ) will eventually make a final decision on the GATT-Conformity of the banana regime. Should the ECJ rule that the banana regime is not in conflict with the GATT, the German constitutional court is expected to rule on whether the EU's banana regulation is in conflict with the German constitution, which gives precedence to pre-existing international treaty obligations.

February 7: Hawaiian delegation and other members of Congress write to USTR asking that (1) an unfairness determination be issued against Costa Rica and Colombia by February 10 if those countries have not withdrawn from the Framework Agreement, and (2) that at the conclusion of the public comment period (February 10, 1995) a formal unfairness determination be issued against the EU with a time specific warning period for providing relief.

February 10: Deadline for public comments on (1) the banana practices of Colombia and Costa Rica and (2) appropriate action to take against

the EU banana regime, including trade retaliation.

February-March: Consultations are held with Costa Rica and Colombia. Both governments refuse to withdraw from the Framework Agreement despite numerous USTR requests for cooperation.

March: Consultations are held with the EU in Brussels.

April: EU officials travel to Washington for negotiations April 11-12. Costa Rica and Colombia continue to enforce the Framework Agreement, causing further harm to U.S. banana producers and marketing companies. USTR has not yet issued an unfairness determination against Costa Rica and Colombia, nor has it issued an unfairness determination against the EU.

May 4: Kantor meets with Sir Leon Brittan in Canada.

May 9: Consultations are held with Colombian Ministers in Washington, D.C.

May 16: Consultations are held with Costa Rican ministers in Washington, D.C.

May 18: Six U.S. Senators and six U.S. Representatives join in a "Dear Colleague" to counter misleading trade press and to urge support for pending 301 cases.

May 22: Consultations are held with the EU in Brussels. Kantor meets with Sir Leon Brittan.

August 3: Hawaiian delegation and Senator Hatch write to USTR urging swift elimination of export quotas and licenses available in Colombia and Costa Rica.

August 16: USTR announces a negotiated solution to the banana case is unattainable and that the U.S. will launch a WTO challenge against the EU.

September 17: USTR terminates the 301 investigation of the EU banana regime initiated on October 17, 1994 on behalf of Chiquita Brands International, Inc. and Hawaii Banana Industry Association.

September 27: USTR initiates a second investigation of the acts, policies and practices of the EU regime concerning the importation, sale and distribution of bananas. Previously, in response to a petition filed on September 2, 1994, by Chiquita Brands International, Inc. and the Hawaii Banana Industry Association pursuant to section 302 (a) of the Trade Act alleging that various policies and practices of the EU, Colombia, Costa Rica, Nicaragua and Venezuela concerning bananas are discriminatory, unreasonable and burden or restrict United States commerce, the USTR had initiated on October 17, 1994, an investigation of the EU Banana import regime. On the basis of the consultations with the EU, the comment received and consultations with petitioner and with the relevant private sector advisory committees, the USTR decided that issues raised in the first investigation involve agreements annexed to the Agreement Establishing the WTO, including the General Agreement on Tariffs and Trade, the Agreement on Import Licensing Procedures and the *General Agreement on Trade in Services*, should most appropriately be addressed by resort to the procedures of the WTO Dispute Settlement Understanding.

September 27: USTR announces that the United States has requested consultations with the EU pursuant to the WTO's Understanding on Rules and Procedures concerning the Settlement of Disputes (DSU), between the United States and the EU on the banana crisis.

October 24: USTR initiates an investigation pursuant to section 302 (b) of the Trade Act of 1974 (Trade Act) in order to preserve U.S. rights under a trade agreement, and with respect to the denial of benefits under a trade agreement by the European Union, arising from the accession of Austria, Finland and Sweden. Under Articles XXIV:6 and XXXVIII of the General Agreement of Tariffs and Trade 1994 (GATT 1994) attached to the Agreement Establishing the World Trade Organization (WTO Agreement), whenever two or more Members of the WTO form customs union and thereby withdraw or modify tariff

concessions, they must provide full and permanent compensation to relevant affected trading partners; if such compensation is not provided, then those other trading partners have the rights to retaliate unilaterally.

October 26: Consultations with the EU were held in Geneva. The United States, Mexico, Guatemala, Honduras, and the European Union participated. Colombia, Costa Rica, and Caribbean banana producing countries observe the consultations.

To date, there appears to be no indications that the EU will back off its position on import licenses and quotas.

The EU's new banana policy has cost American-based firms millions of dollars over the last two years by restricting Latin American produced bananas into Europe.

December 18-19,1995: EU Agriculture Council considers EU Commission proposal to increase the size of the EU Banana Tariff-rate Quota for third country (Latin American) bananas by the current EFTA-3 volume, and the propose adoption of a licenses usage system beginning in 1996 (with full implementation in 1999).

Reportedly, the EU Agriculture Council at its December 18-19,1995 meeting, may consider an EU commission proposal to increase the EU banana tariff-rate quota for third country, Latin American, bananas by the current EFTA-3 volume of 353,000 tons, which would increase the current tariff-rate quota of 2.2 million tons to 2.553 million metric tons, and subject all of the tariff-rate quota volume to directive 92/404, thus providing a windfall (of 105,900 tons to Category B license holders, based on 30 percent of the 92/404 tariff-rate quota volume increase of 353,000 tons) to traditional ACP banana importers.

EU change in transitional regulations (outside 92/404) would hurt U.S. banana marketing firm exports to the former EFTA-3

This proposal, if adopted, would deprive U.S. banana marketing firms of a substantial portion (a loss of 105,900 tons or 30 percent of 353,000 tons) of the licenses they now hold for banana imports into Sweden, Austria, and Finland. In addition, the allocation of licenses for 30 percent of the former EFTA-3 volume to traditional ACP banana importers would likely only complicate any future attempt to negotiate a settlement of the bananas issue, since the EU Commission thus far has held back fully integrating the former EFTA-3 into the Directive 92/404-Regime, at least in part, to allow itself some flexibility (from which to draw licenses) should a negotiated settlement become possible.

LICENSING USAGE

The allocations of so-called Category A licenses permitting the importation of "Third country bananas" (Latin American) is made under an "Activity Function" method which allocates banana import licenses to primary importers, secondary importers, and ripeners based upon their historic importation or ripening of third country fruit in the EU. License allocations for a particular year are based upon a reference period consisting of the "Average quantities of bananas marketed in the three most recent years for which figures are available." For example, allocations for 1995 were based upon a 1991 to 1993 reference period.

Under the current EU regulations, firms seeking Category A licenses must submit to EU member state authorities figures concerning the quantities of bananas they claim to have imported or ripened during the relevant three year reference period. The EU Commission has found that firms importing and ripening bananas have made reference quantity claims in substantial excess of the actual banana imports during a relevant reference period. This over counting, referred to

as "double counting," can be attributed in part to legitimate confusion on the part of operators as to whether they qualify for status as primary or secondary importers or ripeners entitled to a license allocation. In addition, however, a substantial part of "double counting" is apparently attributable to fraudulent over counting by some (often small) operators.

EU Commission addresses "double counting" problem

In order to address the "double counting" issue, commission authorities in the past have conducted audits of operators to establish the legitimacy of their claims. Large, multi-national banana marketing firms, reportedly, have apparently been more intensively audited than small (mostly European) operators. This more intensive auditing of large firms is reportedly based at least in part upon their relative size and not because there is a greater tendency on their part to overstate their reference quantities.

To address the over counting problem, once audits have been completed, the EU Commission reduces reference quantities claimed by different operators (as adjusted by the results of any audit) on the basis of a so-called reduction coefficient. The same reduction coefficient is applied to all operators, regardless of whether they have been audited or not.

U.S. marketing firms have complained that the practical affect of the reduction coefficient exercise has been to deny then licenses to which they are legitimately entitled. They attribute this under allocation (or erosion) of licenses to the fact that they are more likely to be audited than other firms and that they naturally do not submit dubious claims to reference quantities. One U.S. operator reportedly has estimated that the Commission's failure to fully address the "double counting" issue will result in its having some 30 percent fewer Category A licenses during 1996 than it would have had if all "double counting" had been detected and eliminated.

For further information, contact Emanuel McNeil at (202) 720-2083.

United States Imports of Fresh Bananas

Origins	1992		1993		1994		1995 1/	
	MT	$1,000	MT	$1,000	MT	$1,000	MT	$1,000
Costa Rica	954	281	922	272	977	248	879	281
Ecuador	896	259	761	206	786	204	866	239
Colombia	416	127	596	166	629	187	418	123
Honduras	411	106	427	105	497	126	517	136
Guatemala	382	124	378	118	440	132	433	126
Mexico	396	102	308	94	192	58	148	44
Panama	37	10	77	21	155	37	114	31
Venezuela	37	13	43	12	17	5	4	1
Others	2	0	1	1	2	0	1	1
Total	**3,531**	**1,022**	**3,513**	**995**	**3,694**	**996**	**3,380**	**982**

Source: U.S. Department of Commerce, Bureau of the Census.
1/ January-November

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
NOV 95

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FRESH FRUIT											
FR APPLES(JUL)	MT										
TAIWAN		14,975	15,832	58,241	50,923	115,342	12,532	10,835	45,732	35,255	87,403
MEXICO		233	651	27,567	17,646	87,269	111	390	15,810	9,237	48,541
CANADA		5,526	6,951	35,308	34,611	80,941	3,724	5,062	24,061	26,095	57,839
HONG KONG		2,984	3,617	25,126	21,892	74,782	1,703	2,549	14,363	13,771	42,447
EU 15		9,673	6,357	19,141	12,733	52,609	3,867	3,260	9,007	7,057	26,280
INDONESIA		3,282	4,387	15,063	20,418	43,268	1,914	3,097	8,612	13,515	25,653
OTHER		45,582	35,126	120,311	75,938	243,618	20,993	20,099	59,507	45,890	134,915
Subtotal:-----		82,253	72,921	300,757	234,161	697,829	44,843	45,291	177,092	150,820	423,079
FR PEARS(JUL)	MT										
MEXICO		5,614	1,780	26,053	8,644	46,838	2,549	930	11,707	4,485	22,124
CANADA		5,463	4,767	26,342	24,995	43,892	3,513	3,444	15,152	17,127	27,391
EU 15		3,710	6,102	4,465	7,163	9,096	1,244	2,380	1,644	2,861	3,585
BRAZIL		3,588	9,533	7,689	17,690	8,882	1,519	3,744	3,451	7,626	4,031
TAIWAN		996	1,553	2,385	4,025	8,547	570	844	1,450	2,346	5,169
OTHER		3,489	4,461	9,115	10,937	17,519	1,729	2,340	5,013	6,245	9,997
Subtotal:-----		22,859	28,195	76,049	73,453	134,774	11,123	13,682	38,417	40,691	72,297
APRICOTS(MAY)	MT										
MEXICO		8	0	3,534	324	3,718	6	0	2,483	289	2,596
CANADA		0	4	3,049	2,578	3,145	0	5	3,185	3,508	3,301
OTHER		60	65	926	1,070	1,010	91	43	1,881	2,049	1,929
Subtotal:-----		68	69	7,509	3,972	7,873	97	49	7,549	5,847	7,827
FR CHERRIES(MAY)	MT										
JAPAN		0	0	15,551	17,170	15,597	0	0	92,520	110,553	92,582
CANADA		7	11	6,259	3,399	6,379	18	32	13,146	8,603	13,357
EU 15		55	814	3,896	6,068	5,086	36	599	10,894	9,855	11,880
TAIWAN		2	0	3,004	2,098	3,056	4	0	8,133	6,325	8,328
UNITED KINGDOM		0	0	2,206	1,112	2,245	0	0	7,784	4,669	7,817
OTHER		0	109	1,912	1,659	1,921	0	105	5,779	4,227	5,825
Subtotal:-----		64	934	30,622	30,395	32,039	58	735	130,472	139,563	131,972
PEACH-NECTRN(MAY)	MT										
CANADA		36	18	47,049	39,224	48,567	53	31	38,820	40,988	40,639
MEXICO		0	0	16,171	11,674	16,203	0	0	6,832	5,159	6,851
TAIWAN		16	0	12,446	9,818	12,462	7	0	13,511	11,033	13,530
OTHER		111	78	6,985	4,435	7,166	100	55	5,334	3,774	5,475
Subtotal:-----		162	96	82,651	65,151	84,399	160	86	64,497	60,954	66,494
PLUM-PRUNES(MAY)	MT										
TAIWAN		0	0	25,378	13,885	25,396	0	0	22,137	14,979	22,161
CANADA		12	33	23,868	13,621	24,565	16	58	18,255	19,574	19,218
HONG KONG		0	0	8,852	5,427	8,863	0	0	7,300	6,088	7,323
OTHER		418	65	11,903	4,354	12,537	286	56	8,896	4,722	9,786
Subtotal:-----		430	98	70,001	37,288	71,360	302	113	56,588	45,363	58,487
FR AVOCADOS(OCT)	MT										
EU 15		225	838	644	2,165	8,266	194	553	495	1,397	7,016
FRANCE		54	38	189	136	5,243	57	18	147	76	4,300
JAPAN		68	16	133	81	2,086	107	10	200	88	3,960
CANADA		237	160	424	331	1,958	196	151	350	322	1,969
NETHERLANDS		87	572	278	1,513	1,303	74	415	222	1,016	1,166
UNITED KINGDOM		84	157	139	344	1,228	63	79	98	210	1,180
OTHER		0	13	2	13	181	0	20	3	20	284
Subtotal:-----		530	1,027	1,203	2,590	12,490	497	733	1,048	1,827	13,229
FR KIWIFRUIT(OCT)	MT										
CANADA		598	256	931	347	4,021	661	330	1,066	454	4,885
KOREA, REPUBLIC		56	165	95	219	2,659	105	240	172	345	4,282
TAIWAN		45	18	51	33	1,395	59	17	71	42	2,140
OTHER		422	13	428	27	1,430	426	19	435	30	1,778
Subtotal:-----		1,121	452	1,504	627	9,505	1,251	606	1,744	872	13,084
FRESH GRAPES (MAY)	MT										
CANADA		6,036	7,572	95,556	94,705	101,631	9,598	10,621	103,287	106,612	112,109
MEXICO		5,896	2,185	18,088	6,785	22,589	5,079	2,259	15,114	6,226	19,218
HONG KONG		2,607	6,533	20,112	25,239	21,192	3,363	8,833	23,918	34,171	25,353
TAIWAN		1,066	1,998	13,596	11,533	14,731	1,558	2,421	19,646	14,695	20,876
OTHER		14,640	17,977	48,676	50,626	54,961	20,080	24,845	66,123	70,735	74,266
Subtotal -----		30,244	36,265	196,028	188,887	215,105	39,677	48,980	228,088	232,438	251,822
FR STRAWBRIS(JAN)	MT										
CANADA		425	414	38,431	36,618	38,873	895	1,051	50,951	49,599	52,089
MEXICO		134	0	6,802	3,002	6,816	129	0	6,220	2,396	6,245
EU 15		139	193	5,722	2,691	5,738	309	466	11,802	6,321	11,850
JAPAN		585	914	4,315	6,586	4,338	3,331	3,411	20,962	24,067	21,177
UNITED KINGDOM		105	103	3,689	2,154	3,700	196	235	7,369	5,133	7,394
OTHER		84	80	1,512	1,037	1,570	224	206	4,842	2,971	5,003
Subtotal:-----		1,367	1,601	56,783	49,934	57,335	4,887	5,134	94,777	85,354	96,365
FR ORNG INC TMPL(NOV)	MT										
CANADA		16,575	15,178	16,575	15,178	178,854	8,397	8,911	8,397	8,911	86,917
JAPAN		7,896	5,592	7,896	5,592	168,591	5,941	4,676	5,941	4,676	117,639
HONG KONG		8,072	1,566	8,072	1,566	128,098	3,742	716	3,742	716	65,705
OTHER		3,318	1,320	3,318	1,320	100,574	1,905	886	1,905	886	53,495
Subtotal:-----		35,862	23,656	35,862	23,656	576,116	19,985	15,188	19,985	15,188	323,756
FR GRPFRT(SEP)	MT										
JAPAN		19,185	16,191	36,614	34,775	246,310	12,326	10,996	22,327	23,133	136,506
EU 15		12,458	28,264	25,585	39,439	116,454	5,454	13,239	11,411	18,379	51,175
CANADA		6,739	8,204	20,633	19,396	77,472	2,628	3,196	8,252	8,499	30,226
FRANCE		3,812	8,698	10,133	12,979	43,428	1,710	4,099	4,530	6,048	19,016
NETHERLANDS		3,051	12,317	7,374	16,777	33,908	1,449	5,602	3,443	7,687	15,232
OTHER		1,750	2,079	2,849	3,606	45,648	983	1,016	1,514	1,932	23,343
Subtotal:-----		40,133	54,738	85,681	97,215	485,884	21,391	28,447	43,504	51,943	241,251
FR TANGERINES(NOV)	MT										
CANADA		2,725	2,411	2,725	2,411	10,651	2,260	2,111	2,260	2,111	9,619
JAPAN		0	0	0	0	662	0	0	0	0	843
OTHER		246	152	246	152	1,230	235	139	235	139	1,100
Subtotal:-----		2,971	2,562	2,971	2,562	12,543	2,495	2,250	2,495	2,250	11,563
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		336	687	2,047	2,411	4,595	340	706	2,298	2,543	4,780
CANADA		204	383	1,417	2,621	3,908	210	305	1,568	2,324	3,719
KOREA, REPUBLIC		134	54	672	1,334	2,314	98	36	629	1,071	1,990
TAIWAN		0	77	673	1,045	1,259	0	55	586	928	1,057
SINGAPORE		108	9	585	503	1,164	124	10	687	468	1,233
PHILIPPINES		30	172	731	279	1,018	31	79	525	183	744
OTHER		259	392	2,423	3,289	4,511	231	409	2,123	3,094	4,001
Subtotal:-----		1,071	1,774	8,548	11,484	18,769	1,032	1,600	8,416	10,610	17,524
CND PEARS(JUN)	MT										
CANADA		244	731	1,017	2,582	2,795	230	642	993	2,260	2,510
UNITED ARAB EMIR		76	0	192	66	555	52	0	120	70	323
JAPAN		0	27	176	331	485	0	28	197	331	529
EU 15		19	13	82	76	289	36	9	87	68	272
OTHER		66	36	295	191	596	51	38	262	167	570
Subtotal:-----		405	806	1,762	3,245	4,720	368	718	1,659	2,896	4,204

U.S. EXPDRTS DF SELECTED CDMMDDITIES BY DESTINATIDN
MARKETING YEAR BEGINNING A5 INDICATED
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COMMODITY AND COUNTRY / COUNTRY REGIDN		QUANTITY CURR MO LA5T YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LA5T YR	QUANTITY YR TDT CURR YR	QUANTITY LA5T YEAR	VALUE (1,000 DOLLAR5) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TDT LAST YR	VALUE YR TDT CURR YR	VALUE LAST YEAR
CND PNEAPL(JAN)	MT										
JAPAN		14	83	960	1,062	985	17	52	902	958	929
CANADA		61	43	853	874	947	63	51	797	887	887
EU 15		98	32	614	810	756	95	27	546	627	654
MEXICO		19	64	433	181	522	13	53	291	140	361
GERMANY		27	32	287	651	420	20	27	234	495	335
RUSSIAN FEDERATI		104	0	256	17	302	81	0	166	9	204
OTHER		2	18	225	453	268	4	16	221	465	257
5ubtotal:-----		298	240	3,343	3,397	3,779	273	200	2,923	3,086	3,292
FRT MIXTURES(JUN)	MT										
CANADA		519	361	2,313	2,552	5,635	576	477	2,829	3,310	7,288
JAPAN		565	388	2,776	1,935	5,612	651	456	3,245	2,320	6,645
SINGAPDRE		1,336	397	3,083	2,236	4,476	1,466	460	3,305	2,527	4,835
HONG KONG		290	212	2,032	1,703	3,915	312	233	2,158	1,919	4,366
PHILIPPINE5		573	1,104	1,274	3,027	2,801	722	1,185	1,413	3,491	3,113
OTHER		654	806	3,718	3,348	6,837	722	929	4,275	3,950	7,854
5ubtotal:-----		3,937	3,268	15,197	14,800	29,277	4,448	3,740	17,225	17,516	34,103
DRIED FRUIT											
DRD RAI5IN5(AUG)	MT										
EU 15		4,405	3,884	24,150	24,245	57,471	6,631	6,579	38,083	38,189	89,847
UNTTED KINGDDM		1,515	1,521	10,817	11,528	27,824	2,346	2,784	15,790	17,767	42,083
JAPAN		1,972	1,541	7,812	8,021	24,527	3,000	2,405	11,080	12,577	35,608
CANADA		959	898	4,934	4,691	10,946	1,902	1,805	10,446	9,699	22,187
GERMANY		501	955	2,732	3,962	8,184	760	1,470	3,997	5,809	12,000
OTHER		3,944	3,081	11,672	11,166	27,927	6,945	5,753	19,486	19,938	46,450
Subtotal:-----		11,279	9,404	48,569	48,123	120,871	18,479	16,543	79,095	80,402	194,093
DRD PRUNES(AUG)	MT										
EU 15		3,165	2,198	13,177	12,803	33,645	7,667	5,234	32,152	30,471	82,871
JAPAN		1,280	990	4,470	4,849	13,614	3,104	2,291	10,360	10,996	30,245
GERMANY		438	471	3,493	3,583	10,549	943	1,135	7,894	8,434	25,549
ITALY		532	630	2,229	2,911	6,521	1,378	1,490	5,908	6,814	17,101
UNITED KINGDOM		432	226	1,381	1,275	4,943	1,000	508	2,902	2,822	10,596
CANADA		404	409	1,607	1,388	4,320	855	964	3,657	3,408	10,271
DTHER		1,255	878	3,699	3,687	8,235	2,717	1,879	7,876	7,965	17,546
Subtotal:-----		6,104	4,474	22,954	22,727	59,815	14,342	10,369	54,045	52,840	140,933
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
EU 15		2,674	5,185	91,091	148,694	91,091	1,202	1,709	36,218	59,417	36,218
JAPAN		715	883	69,389	18,017	69,389	493	779	28,196	12,347	28,196
FRANCE		409	1,920	38,676	42,004	38,676	280	590	14,007	14,383	14,007
CANADA		2,173	2,175	33,030	31,993	33,030	3,412	3,374	50,778	53,116	50,778
KOREA, REPUBLIC		4,036	1,192	24,619	19,230	24,619	1,846	545	15,559	10,999	15,559
NETHERLAND5		790	1,272	21,706	65,493	21,706	351	403	8,913	29,793	8,913
OTHER		5,343	5,789	46,673	71,989	46,673	2,110	3,400	19,103	31,600	19,103
Subtotal:-----		14,942	15,225	264,801	289,923	264,801	9,063	9,807	149,855	167,479	149,855
DRNG JU NTCNC(DEC)	KL										
CANADA		6,463	6,190	65,910	88,874	65,910	4,677	4,633	43,797	64,450	43,797
EU 15		4,242	462	52,654	40,805	52,654	2,429	302	32,983	22,965	32,983
BELGIUM-LUXEMBDU		2,726	0	30,665	23,918	30,665	1,608	0	18,995	13,154	18,995
UNITED KINGDOM		1,442	408	13,138	11,324	13,138	756	245	7,492	6,715	7,492
OTHER		2,239	2,649	21,381	23,107	21,381	1,590	1,935	16,115	16,933	16,115
Subtotal:-----		12,944	9,301	139,946	152,786	139,946	8,696	6,870	92,895	104,348	92,895
GRPFRT JU CNC (DEC)	KL										
JAPAN		1,017	725	17,232	14,625	17,232	1,181	518	21,264	14,377	21,264
EU 15		400	1,425	15,814	26,579	15,814	311	983	7,476	16,416	7,476
FRANCE		0	660	6,701	3,027	6,701	0	475	1,922	2,013	1,922
NETHERLANDS		82	86	3,860	15,777	3,860	152	123	2,806	11,070	2,806
CANADA		326	180	3,085	3,249	3,085	515	284	5,140	5,603	5,140
OTHER		968	684	5,012	10,417	5,012	454	450	2,503	4,283	2,503
5ubtotal:-----		2,712	3,014	41,143	54,870	41,143	2,460	2,235	36,383	40,678	36,383
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
JAPAN		12	2	43	2	10,410	79	13	263	13	44,501
CANADA		82	79	177	148	5,577	259	223	534	443	14,163
EU 15		26	48	43	91	1,247	57	74	96	148	3,340
5WTTZERLAND		4	0	4	0	1,083	21	0	21	0	3,960
OTHER		0	4	4	13	227	0	6	27	24	854
5ubtotal:-----		124	133	271	252	18,544	417	316	940	629	66,818
FR ONIDN5(OCT)	MT										
JAPAN		31,712	16,198	67,403	26,364	142,128	8,918	3,675	18,131	5,829	41,391
CANADA		7,816	5,814	13,748	12,113	111,727	3,515	2,696	5,678	4,811	45,284
OTHER		10,228	7,313	25,100	13,600	57,412	3,293	2,177	7,583	4,169	18,352
Subtotal:-----		49,756	29,325	106,251	52,077	311,267	15,726	8,548	31,392	14,810	105,026
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
JAPAN		6,478	3,754	17,656	11,642	58,455	5,730	2,866	15,615	9,194	50,065
EU 15		3,431	4,370	10,417	14,876	41,755	2,646	3,248	7,778	11,608	31,506
TATWAN		1,417	1,726	6,293	5,828	15,315	1,384	1,637	6,184	5,148	14,279
GERMANY		589	1,425	2,031	6,540	14,333	443	1,094	1,555	5,194	10,642
UNITED KINGDOM		916	1,833	2,847	4,181	13,583	676	1,343	2,088	3,303	10,460
HONG KONG		1,208	1,733	4,756	5,247	12,437	1,051	1,421	4,064	4,331	10,484
DTHER		3,269	2,608	12,356	11,228	38,380	2,825	2,018	10,416	9,217	32,879
Subtotal:-----		15,802	14,190	51,479	48,822	166,342	13,637	11,190	44,058	39,499	139,213
CND TOM PAS(JUL)	MT										
CANADA		3,745	3,434	25,196	24,074	47,971	3,044	2,841	20,187	20,079	39,066
JAPAN		1,094	1,380	4,113	4,316	10,450	869	1,132	3,131	3,544	8,400
EU 15		20	42	146	62	6,632	17	33	125	48	5,159
ITALY		0	0	20	0	6,361	0	0	17	0	4,903
OTHER		2,567	4,882	8,886	11,795	24,833	2,277	2,782	7,421	8,324	20,846
Subtotal:-----		7,426	9,738	38,342	40,247	89,886	6,207	6,787	30,864	31,995	73,471
CND TOM SAUCE(JUL)	MT										
CANADA		5,033	3,506	17,861	20,981	50,570	4,609	3,148	17,661	19,896	48,443
EU 15		177	440	2,778	1,521	7,888	201	334	2,799	1,800	8,307
JAPAN		416	676	2,100	2,251	6,052	579	727	2,525	2,283	7,249
MEXICD		777	167	3,724	999	5,653	486	114	2,526	848	3,882
UNITED KINGDOM		12	220	1,638	621	5,016	24	159	1,494	610	4,781
OTHER		1,022	937	3,879	4,741	8,856	950	1,013	3,851	5,105	9,499
5ubtotal:-----		7,425	5,728	30,343	30,493	79,019	6,824	5,337	29,363	29,933	77,380

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
NOV 95

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		3,707	4,159	16,244	16,335	38,749	3,763	3,729	15,565	14,759	37,029
TAIWAN		628	48	3,456	257	5,314	442	40	2,838	262	4,347
CANADA		254	166	1,452	976	3,863	203	146	1,119	849	3,012
AUSTRALIA		579	0	1,680	832	3,762	496	0	1,391	655	3,036
HONG KONG		304	313	1,644	1,448	3,716	272	220	1,486	1,128	3,157
OTHER		1,156	864	5,821	4,928	12,961	951	671	4,345	3,624	9,435
Subtotal -----		6,628	5,550	30,297	24,776	68,366	6,127	4,807	26,745	21,278	60,015
FZN F FRY(JUL)	MT										
JAPAN		13,387	16,566	61,526	72,454	158,699	9,795	12,189	44,361	52,870	115,179
EU 15		2,824	472	2,977	7,524	36,974	2,000	332	2,177	5,039	26,383
KOREA, REPUBLIC		1,920	1,579	6,937	7,184	19,782	1,392	1,167	5,031	5,309	14,199
NETHERLANDS		2,824	38	2,841	3,229	17,021	2,000	54	2,024	2,152	14,206
HONG KONG		948	1,521	6,013	9,463	16,592	645	1,035	4,109	6,257	10,973
OTHER		6,975	8,902	33,903	48,056	95,393	5,031	6,786	25,326	37,075	74,213
Subtotal:-----		26,054	29,040	111,356	144,681	327,440	18,863	21,510	81,004	106,550	240,948
TREE NUTS											
ALMONDS UNSH(JUL)	MT										
INDIA		715	1,062	3,478	3,714	8,201	1,837	2,576	8,983	8,979	20,591
JAPAN		314	461	1,258	2,972	3,375	971	1,573	3,807	7,914	10,069
EU 15		127	617	2,122	2,006	3,195	350	1,515	4,999	4,853	7,767
GERMANY		0	176	1,119	746	1,720	0	419	2,912	1,824	4,483
OTHER		610	505	2,291	1,267	3,614	1,350	1,210	5,099	3,127	8,520
Subtotal -----		1,765	2,645	9,148	9,959	18,385	4,508	6,874	22,888	24,873	46,948
ALMND SH/PREP(JUL)	MT										
EU 15		10,445	10,712	57,500	69,839	120,402	34,795	31,741	203,824	240,860	423,076
GERMANY		3,256	3,854	23,632	26,591	47,817	10,261	12,926	84,018	98,634	167,343
JAPAN		1,634	3,889	6,196	14,027	18,233	6,171	9,701	26,392	38,877	69,671
SPAIN		509	765	4,059	6,863	14,274	1,683	2,650	13,763	27,443	47,767
FRANCE		1,760	1,223	5,376	5,858	12,410	5,635	4,307	19,002	20,510	42,833
NETHERLANDS		978	1,299	6,959	8,955	11,295	3,302	2,841	23,453	23,796	39,351
OTHER		7,171	9,516	29,001	34,634	57,486	22,556	19,235	92,067	82,021	182,741
Subtotal -----		19,250	24,117	92,697	118,498	196,120	63,522	60,677	322,282	361,758	675,488
WALNUTS SH(AUG)	MT										
EU 15		3,033	1,235	5,548	2,648	7,860	5,546	2,219	11,130	5,931	17,020
JAPAN		506	1,250	1,593	2,610	5,953	2,102	4,547	6,862	9,123	22,633
ITALY		2,089	175	3,005	212	3,545	3,508	473	4,861	651	5,864
CANADA		346	250	1,092	850	2,275	945	907	3,196	3,094	7,261
ISRAEL		140	270	494	517	1,372	429	1,270	1,612	2,262	4,707
SPAIN		398	472	746	1,045	1,204	752	781	1,721	2,018	3,291
OTHER		681	792	2,118	1,455	4,556	1,803	2,177	5,501	4,272	14,256
Subtotal:-----		4,706	3,796	10,845	8,080	22,015	10,825	11,120	28,301	24,682	65,876
WALNUTS UNSH(AUG)	MT										
EU 15		11,416	14,137	40,916	45,277	43,938	17,975	27,125	64,091	86,908	69,868
GERMANY		3,093	3,501	12,836	14,063	13,094	4,412	6,558	19,026	26,931	19,452
SPAIN		3,715	5,008	9,470	12,956	10,238	5,975	9,445	14,985	24,003	16,330
ITALY		2,778	3,612	8,139	9,057	9,116	4,486	6,915	12,956	17,488	15,026
NETHERLANDS		1,140	882	5,473	3,857	5,861	1,982	1,765	9,077	7,720	9,768
OTHER		2,812	2,991	6,354	5,492	9,611	4,730	6,044	10,840	10,991	17,226
Subtotal -----		14,228	17,128	47,270	50,769	53,549	22,705	33,169	74,931	97,899	87,094
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		449	328	815	485	2,829	2,428	1,702	4,286	2,501	14,879
CANADA		81	123	277	277	1,382	565	783	1,835	1,744	9,139
EU 15		120	139	226	235	1,099	611	765	1,387	1,265	7,044
JAPAN		0	0	0	0	451	0	0	0	0	2,873
COLOMBIA		0	0	0	0	435	0	0	0	0	2,578
GERMANY		68	38	68	62	418	391	160	391	253	2,705
OTHER		69	92	142	290	706	413	345	778	1,190	3,433
Subtotal:-----		719	682	1,461	1,288	6,903	4,018	3,596	8,287	6,700	39,947
HOP EXTRACT(SEP)	MT										
EU 15		206	258	405	408	1,499	3,753	3,293	6,091	5,991	23,750
MEXICO		99	130	177	155	735	2,774	3,694	4,761	3,985	15,944
GERMANY		116	125	169	158	624	2,097	1,684	2,542	2,193	9,542
BRAZIL		25	10	108	67	458	360	38	954	771	5,350
COLOMBIA		0	0	26	0	427	0	0	213	0	7,160
KOREA, REPUBLIC		0	13	22	16	311	0	358	460	461	3,470
OTHER		62	20	266	108	1,024	882	320	4,002	1,661	14,957
Subtotal -----		391	432	1,001	755	4,454	7,768	7,703	16,480	12,869	70,630
HOPS,NSPF(SEP)	MT										
EU 15		180	214	498	1,263	1,544	1,048	1,234	2,477	6,177	9,651
GERMANY		53	116	328	949	1,108	381	659	1,575	4,317	6,842
UNITED KINGDOM		125	99	168	269	418	655	574	889	1,535	2,512
MEXICO		0	74	0	74	189	0	265	0	265	1,494
BRAZIL		0	6	92	6	169	0	75	644	75	957
JAPAN		0	1	0	1	146	0	6	0	6	941
OTHER		50	19	96	38	445	281	239	591	472	2,795
Subtotal:-----		230	315	686	1,381	2,492	1,329	1,818	3,713	6,994	15,838
WINE											
GRAPE WINE(JAN)	KL										
EU 15		2,240	3,468	40,281	50,627	42,518	3,700	6,655	63,049	83,889	66,365
CANADA		3,056	2,964	30,515	25,336	32,725	5,293	6,191	44,739	46,686	49,168
UNITED KINGDOM		1,091	2,080	19,192	29,494	19,825	2,110	4,145	36,266	52,062	37,484
JAPAN		1,716	1,611	13,626	15,271	14,420	2,628	3,125	20,151	26,207	21,439
SWEDEN		301	77	6,475	3,054	6,841	114	151	4,135	3,051	4,335
OTHER		2,312	2,997	26,506	27,787	28,217	3,319	4,716	37,794	42,081	40,531
Subtotal:-----		9,325	11,040	110,927	119,019	117,880	14,939	20,686	165,733	198,863	177,503

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
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COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY: CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	VALUE (1,000 DOLLARS): CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
NEW ZEALAND		0	0	4,478	11,332	39,444	0	0	6,293	15,086	44,187
CANADA		7,376	9,692	22,301	37,885	43,220	2,264	3,873	7,072	12,412	17,224
SOUTH AFRICA, RE		0	0	5,508	9,265	19,167	0	0	4,544	5,396	14,231
OTHER		5	0	209	354	24,572	6	0	132	135	9,369
Subtotal:-----		7,381	9,692	32,496	58,837	126,404	2,270	3,873	18,042	33,030	85,011
FR PEARS(JUL)	MT										
CHILE		0	0	56	18	26,058	0	0	20	6	9,407
ARGENTINA		0	0	0	0	12,527	0	0	0	0	7,282
SOUTH AFRICA, RE		0	0	0	0	6,524	0	0	0	0	4,122
OTHER		551	730	950	1,226	2,929	1,824	2,224	3,025	3,608	5,520
Subtotal:-----		551	730	1,007	1,245	48,038	1,824	2,224	3,045	3,614	26,332
APRICOT (MAY)	MT										
CHILE		12	6	12	6	919	25	26	25	26	651
NEW ZEALAND		0	0	0	0	259	0	0	0	0	593
OTHER		26	0	55	6	56	34	0	66	9	69
Subtotal:-----		38	6	66	12	1,233	58	26	91	35	1,313
PEACH-NEC(MAY)	MT										
CHILE		498	169	498	169	49,100	390	184	390	184	31,406
OTHER		0	0	187	232	368	0	0	155	221	356
Subtotal:-----		498	169	685	401	49,468	390	184	545	405	31,762
PLUM-PRUNE(MAY)	MT										
CHILE		12	0	111	2	23,124	24	0	84	6	15,369
OTHER		55	29	189	162	291	64	30	226	232	420
Subtotal:-----		67	29	300	165	23,414	88	30	310	239	15,789
FRESH GRAPES (MAY)	MT										
CHILE		1,031	0	5,232	1,600	280,758	977	0	4,282	1,201	217,136
MEXICO		3	0	41,044	80,492	41,048	4	0	46,571	82,696	46,576
OTHER		141	274	943	1,933	4,354	139	408	388	1,227	7,106
Subtotal:-----		1,175	274	47,219	84,024	326,160	1,119	408	51,240	85,124	270,818
FR RASPBRY(JAN)	MT										
CANADA		0	0	6,176	6,362	6,176	0	0	13,062	11,568	13,062
OTHER		130	126	959	1,326	1,253	512	605	2,065	4,697	2,881
Subtotal:-----		130	126	7,135	7,688	7,429	512	605	15,127	16,265	15,943
FR STRAWBRIS(JAN)	MT										
MEXICO		304	369	18,197	25,187	18,950	377	480	30,831	42,593	31,945
OTHER		366	306	538	462	893	1,054	995	1,439	1,338	2,360
Subtotal:-----		670	674	18,735	25,649	19,843	1,431	1,475	32,271	43,932	34,305
FR BANANA(JAN)	MT										
COSTA RICA		71,543	76,582	899,840	879,953	977,101	20,444	24,484	225,470	281,515	247,820
ECUADOR		56,171	67,323	717,976	866,342	785,910	14,671	18,040	186,101	238,589	204,154
COLOMBIA		55,996	30,028	582,955	417,959	629,509	16,221	9,134	172,800	122,606	186,765
OTHER		112,070	119,319	1,215,939	1,215,909	1,301,463	27,500	30,834	335,016	339,716	357,419
Subtotal:-----		295,781	293,252	3,416,710	3,380,162	3,693,983	78,836	82,493	919,387	982,426	996,158
FR MANGO(JAN)	MT										
MEXICO		0	0	108,432	114,746	108,432	0	0	81,678	100,600	81,678
OTHER		1,699	2,193	12,439	25,615	15,163	2,378	3,322	12,398	20,774	15,151
Subtotal:-----		1,699	2,193	120,872	140,361	123,596	2,378	3,322	94,076	121,374	96,829
FR PINAPLE(JAN)	MT										
COSTA RICA		6,005	6,145	75,949	71,246	82,295	2,170	2,328	26,370	25,447	28,637
HONDURAS		1,886	3,301	26,941	30,996	28,782	521	523	7,418	8,384	7,927
OTHER		393	793	15,555	11,702	16,784	154	247	3,309	2,983	3,523
Subtotal:-----		8,284	10,239	118,445	113,944	127,861	2,845	3,099	37,097	36,814	40,086
FR CANTLPE(MAY)	MT										
MEXICO		8,507	11,473	26,069	41,278	83,693	2,771	3,753	8,335	13,305	22,689
COSTA RICA		0	0	5,738	5,291	46,258	0	0	2,179	2,133	20,467
GUATEMALA		11,731	5,286	15,537	10,008	48,065	3,299	1,567	4,733	3,086	14,828
HONDURAS		1,975	0	4,757	2,391	60,850	499	0	1,115	569	13,895
OTHER		890	1,508	1,191	2,249	23,389	201	371	269	566	5,421
Subtotal:-----		23,103	18,267	53,293	61,218	262,255	6,771	5,692	16,631	19,659	77,301
FR MELON,OT(MAY)	MT										
MEXICO		6,139	9,263	23,609	25,292	44,191	1,825	2,642	8,088	8,498	14,639
COSTA RICA		12	0	1,027	970	26,556	2	0	395	391	12,098
OTHER		3,449	1,215	5,351	5,054	50,121	993	356	1,564	1,346	16,032
Subtotal:-----		9,600	10,478	29,987	31,315	120,868	2,820	2,998	10,046	10,235	42,768
FR ORANGES(NOV)	MT										
AUSTRALIA		0	0	0	0	5,523	0	0	0	0	6,391
MEXICO		0	0	0	0	7,589	0	0	0	0	2,922
OTHER		194	127	194	127	4,926	41	44	41	44	1,652
Subtotal:-----		194	127	194	127	18,038	41	44	41	44	10,967
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EU 15		707	154	28,612	23,110	29,717	594	205	22,391	22,630	23,341
SPAIN		707	154	28,478	23,101	29,580	594	205	22,267	22,601	23,213
CHINA, PEOPLES R		1,938	30	18,190	10,684	19,914	1,354	26	13,506	9,687	14,697
OTHER		21	0	853	460	948	15	0	755	558	828
Subtotal:-----		2,667	184	47,655	34,253	50,578	1,962	231	36,652	32,875	38,866
CND BLK OLV(NOV)	MT										
EU 15		655	1,283	655	1,283	10,964	1,504	2,896	1,504	2,896	24,733
SPAIN		452	1,144	452	1,144	9,197	975	2,589	975	2,589	20,510
MOROCCO		142	401	142	401	5,215	255	879	255	879	10,441
OTHER		7	6	7	6	115	10	11	10	11	245
Subtotal:-----		804	1,690	804	1,690	16,303	1,768	3,786	1,768	3,786	35,440
CND GRN OLV(NOV)	MT										
EU 15		3,359	3,287	3,359	3,287	33,202	9,808	10,021	9,808	10,021	100,701
SPAIN		3,268	3,234	3,268	3,234	32,838	9,654	9,912	9,654	9,912	99,890
OTHER		144	115	144	115	2,245	190	226	190	226	3,528
Subtotal:-----		3,502	3,402	3,502	3,402	35,447	9,999	10,246	9,999	10,245	104,229
CND PEACH(JUN)	MT										
EU 15		2,219	1,043	8,423	4,970	17,050	1,230	713	4,656	3,143	9,623
GREECE		2,145	1,040	8,260	4,920	16,743	1,160	703	4,493	3,018	9,266
OTHER		264	437	2,448	2,357	3,689	203	301	1,591	1,650	2,430
Subtotal:-----		2,483	1,481	10,871	7,327	20,739	1,433	1,015	6,246	4,793	12,052
CND PINAPLE(JAN)	MT										
THAILAND		12,326	2,530	140,384	96,234	154,150	6,287	1,710	71,889	51,110	78,883
PHILIPPINES		7,036	12,902	122,680	115,911	129,101	3,811	8,087	70,587	66,250	74,096
OTHER		5,872	11,506	45,361	66,182	50,388	2,113	4,787	18,277	27,926	20,440
Subtotal:-----		25,235	26,939	308,425	278,327	333,639	12,212	14,585	160,753	145,286	173,419
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		1,484	2,373	5,420	5,956	14,039	2,224	5,056	8,407	11,657	22,370
OTHER		0	50	98	259	250	0	201	237	896	687
Subtotal:-----		1,484	2,423	5,518	6,215	14,290	2,224	5,257	8,644	12,553	23,057

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COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (1,000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TDT LAST YR	VALUE YR TDT CURR YR	VALUE LAST YEAR
DATES(SEP)	MT										
PAKISTAN		244	242	385	377	1,757	209	228	311	341	1,708
CHINA, PEOPLES R		47	33	72	40	592	90	55	133	73	868
OTHER		25	236	149	470	414	74	281	367	779	834
Subtotal:-----		316	512	606	886	2,764	374	564	811	1,193	3,410
DRD FIG(SEP)	MT										
EU 15		330	134	994	821	1,134	815	308	2,502	1,911	2,736
GREECE		329	131	968	802	1,069	813	289	2,394	1,849	2,572
TURKEY		90	312	438	362	1,420	170	686	789	800	1,927
MEXICO		0	19	233	224	365	0	53	834	716	1,209
OTHER		2	2	16	4	28	3	4	50	9	71
Subtotal:-----		422	467	1,681	1,411	2,948	988	1,050	4,175	3,436	5,943
DRD RAISIN(AUG)	MT										
MEXICO		843	1,012	2,654	4,306	5,543	758	900	2,297	3,551	4,929
CHILE		183	29	858	702	2,316	228	33	1,042	814	2,807
TURKEY		254	142	655	416	1,863	252	138	606	418	1,871
OTHER		80	57	177	131	426	82	71	199	135	447
Subtotal:-----		1,360	1,240	4,343	5,554	10,148	1,320	1,142	4,144	4,918	10,055
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EU 15		26,005	27,216	93,501	63,443	288,358	6,077	11,037	19,600	26,007	75,810
ARGENTINA		22,778	0	170,726	127,746	336,203	3,696	0	26,346	45,944	71,749
GERMANY		23,078	14,977	67,091	34,838	213,744	5,116	6,100	13,857	14,506	57,562
OTHER		46,203	30,703	151,797	124,015	355,342	10,006	13,510	27,722	44,577	79,096
Subtotal:-----		94,987	57,919	416,024	315,204	979,904	19,778	24,547	73,668	116,527	226,655
FCOJ(OEC)	KL										
BRAZIL		137,879	80,641	1,294,427	390,548	1,294,427	23,398	18,786	235,899	82,477	235,899
OTHER		9,120	11,195	220,694	334,998	220,694	2,146	2,650	52,557	79,921	52,557
Subtotal:-----		146,998	91,835	1,515,121	725,546	1,515,121	25,544	21,436	288,456	162,397	288,456
GRAPE JU(JAN)	KL										
EU 15		133	81	21,853	3,293	23,269	91	71	11,814	1,966	12,643
ITALY		104	62	10,742	3,181	12,156	74	40	5,644	1,889	6,471
SPAIN		0	0	10,898	69	10,898	0	0	6,017	17	6,017
BRAZIL		472	321	11,966	7,773	12,663	149	145	4,182	2,698	4,500
OTHER		3,142	12,676	27,512	63,950	30,935	995	3,477	8,482	17,827	9,537
Subtotal:-----		3,747	13,078	61,332	75,017	66,866	1,235	3,692	24,478	22,491	26,679
PNEAPL JUCN(JAN)	KL										
PHILIPPINES		6,009	10,233	89,907	100,838	95,904	788	1,609	14,519	14,137	15,324
THAILAND		5,237	2,949	84,261	91,140	92,632	754	696	13,213	16,421	14,423
OTHER		1,374	3,812	22,076	22,334	24,503	268	1,047	5,029	5,359	5,518
Subtotal:-----		12,620	16,993	196,244	214,311	213,039	1,810	3,351	32,762	35,917	35,265
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		3,263	3,794	41,802	48,494	43,380	1,036	1,241	11,785	15,106	12,278
THAILAND		844	2,498	9,088	12,562	10,030	533	703	7,403	8,840	8,176
OTHER		1,513	3,763	9,071	14,752	10,691	226	524	1,743	2,597	2,058
Subtotal:-----		5,619	10,056	59,961	75,808	64,101	1,795	2,468	20,932	26,543	22,511
FROZEN FRUIT											
FZN STRBRY(OEC)	MT										
MEXICO		192	499	17,926	26,227	17,926	223	298	17,210	24,480	17,210
OTHER		20	13	866	701	866	75	68	2,208	2,239	2,208
Subtotal.-----		212	512	18,792	26,928	18,792	298	366	19,418	26,719	19,418
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		180	1,091	205	1,206	12,543	295	1,006	336	1,147	20,264
OTHER		59	8	80	28	1,656	29	10	48	29	1,360
Subtotal:-----		239	1,098	285	1,234	14,198	324	1,016	384	1,175	21,624
FR CARROT(OCT)	MT										
CANADA		13,206	12,283	24,587	23,465	73,712	3,222	3,038	5,936	5,959	22,668
MEXICO		358	2,215	363	3,178	27,215	37	324	46	478	4,195
OTHER		21	15	43	17	242	9	4	18	6	202
Subtotal.-----		13,586	14,512	24,993	26,660	101,168	3,268	3,366	6,000	6,443	27,065
FR CABBAGE(OCT)	MT										
CANADA		3,156	2,677	6,122	6,738	25,106	759	672	1,461	1,784	6,713
MEXICO		401	1,664	1,011	2,735	8,547	74	294	193	472	1,690
OTHER		1	0	1	0	34	7	0	7	1	25
Subtotal:-----		3,558	4,340	7,134	9,474	33,687	840	966	1,660	2,257	8,428
FR CELERY(OCT)	MT										
MEXICO		554	1,263	554	1,263	20,056	159	351	159	351	8,951
OTHER		51	56	333	399	3,951	35	29	105	116	1,337
Subtotal:-----		605	1,318	887	1,661	24,006	194	380	264	467	10,289
FR CUCMBR(OCT	MT										
MEXICO		20,903	31,858	23,563	37,791	216,388	8,801	7,837	9,995	9,070	119,326
OTHER		498	321	956	782	21,095	293	239	775	808	8,193
Subtotal:-----		21,401	32,179	24,519	38,574	237,483	9,094	8,077	10,770	9,879	127,519
FR CAULFLWR(OCT)	MT										
CANADA		4	65	877	387	3,383	1	16	311	117	1,216
MEXICO		16	0	21	0	1,965	5	0	9	0	549
OTHER		0	0	0	0	27	0	0	0	0	23
Subtotal:-----		20	65	898	387	5,375	6	16	320	117	1,787
FRESH VEGETABLES											
FR GARLIC(OCT)	MT										
MEXICO		11	9	34	92	16,004	41	13	136	85	20 144
OTHER		391	447	956	899	6,681	574	531	1,252	1,019	9,106
Subtotal:-----		401	456	989	991	22,685	615	544	1,389	1,104	29,250
FR ONION(OCT)	MT										
MEXICO		9,804	9,710	13,761	13,337	181,755	11,958	15,793	15,630	20,478	112,729
OTHER		2,240	1,978	4,840	4,482	33,020	1,010	807	1,948	1,861	15,472
Subtotal:-----		12,045	11,688	18,601	17,819	214,775	12,968	16,599	17,578	22,339	128,201
FR PEPPERS(OCT)	MT										
MEXICO		6,577	12,923	9,831	24,174	183,383	6,982	8,444	9,679	13,587	179,459
EU 15		2,191	1,454	3,785	2,806	19,511	6,549	4,789	9,224	7,195	52,433
NETHERLANDS		2,074	1,405	3,620	2,728	18,994	6,162	4,617	8,740	6,969	50,912
OTHER		219	596	818	1,564	8,024	637	1,404	1,362	2 467	12,721
Subtotal.-----		8,987	14,973	14,435	28,543	210,918	14,168	14,638	20,265	23,250	244 613
FR SEED POT(OCT)	MT										
CANADA		5,067	5,971	5,415	6,258	99,720	881	887	965	960	17,245
OTHER		0	0	0	0	1	0	0	0	4	9
Subtotal:-----		5,067	5,971	5,415	6,258	99,721	881	887	965	963	17 253
FR TBL POT(OCT)	MT										
CANADA		14,454	34,266	28,493	70 956	146,720	3,253	7,277	5,997	13,825	27,206
OTHER		0	0	0	0	40	0	0	0	0	46
Subtotal:-----		14,454	34,266	28,493	70,956	146,760	3,253	7,277	5,997	13,825	27,252

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
NOV 95

COMMODITY AND COUNTRY		QUANTITY					VALUE (1,000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TOT LAST YR	YR TOT CURR YR	LAST YEAR
FR TOMATO(OCT)	MT										
MEXICO		12,908	32,023	26,715	59,710	534,344	10,645	18,674	19,756	34,062	366,385
OTHER		994	1,734	2,166	3,784	25,427	1,995	3,283	3,765	6,600	39,682
Subtotal:-----		13,902	33,757	28,880	63,494	559,771	12,639	21,957	23,521	40,663	406,067
FR ASPARG(OCT)	MT										
MEXICO		369	491	672	686	21,447	826	1,084	1,232	1,469	36,319
PERU		1,683	1,791	3,387	3,456	9,226	2,584	3,548	5,256	6,828	14,544
OTHER		1,125	1,181	2,065	2,628	3,959	1,041	1,343	1,935	2,841	4,800
Subtotal:-----		3,177	3,463	6,123	6,769	34,632	4,451	5,976	8,422	11,138	55,664
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
MEXICO		3	0	609	3	7,746	2	0	427	2	6,334
CANADA		34	0	429	195	6,814	38	0	295	193	4,527
CHILE		38	98	921	1,946	4,121	28	69	722	1,443	3,133
OTHER		191	584	1,580	2,432	4,406	154	449	977	2,094	3,173
Subtotal:-----		266	682	3,538	4,576	23,087	222	518	2,420	3,731	17,167
CND TOM SAUCE(JUL)	MT										
EU_15		867	608	4,302	2,548	10,090	565	1,081	2,949	2,936	9,414
SPAIN		547	239	3,285	499	6,254	408	824	2,449	1,713	7,416
MOROCCO		1,154	0	2,461	480	4,648	886	0	2,013	1,632	6,295
CANADA		431	277	1,721	5,204	6,056	309	228	1,240	3,577	4,194
OTHER		405	417	1,822	3,182	4,586	277	310	1,202	1,804	2,831
Subtotal:-----		2,855	1,302	10,305	11,414	25,379	2,037	1,619	7,403	9,948	22,734
CND TOMATO(JUL)	MT										
CHILE		1,016	500	6,901	6,516	15,843	447	262	3,260	2,963	7,084
EU_15		1,983	1,167	8,987	7,439	21,746	623	320	2,898	1,987	6,394
ITALY		1,983	1,167	8,936	7,255	21,574	623	320	2,882	1,920	6,343
ISRAEL		468	1,382	3,901	14,027	10,457	150	843	1,148	8,731	3,932
OTHER		18	685	493	1,525	1,828	5	338	250	713	849
Subtotal:-----		3,484	3,734	20,282	29,507	49,875	1,224	1,763	7,556	14,394	18,260
CND MSHROOM(JUL)	MT										
CHINA, PEOPLES R		372	852	6,146	10,627	25,173	773	1,748	10,900	23,003	48,192
INDONESIA		1,561	1,404	7,163	6,261	17,996	4,039	3,365	18,136	16,093	47,163
OTHER		2,332	1,624	12,011	8,673	27,676	6,511	3,889	29,410	20,895	67,047
Subtotal:-----		4,266	3,880	25,320	25,562	70,844	11,323	9,002	58,446	59,991	162,402
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		10,654	15,558	30,494	39,490	147,045	6,706	8,338	18,862	21,665	85,384
OTHER		2,064	2,346	6,086	8,146	19,111	1,423	1,870	4,251	6,210	13,903
Subtotal:-----		12,718	17,904	36,580	47,636	166,156	8,129	10,208	23,113	27,875	99,287
FZN CAULFLR(SEP)	MT										
MEXICO		4,809	2,937	10,185	6,386	23,066	2,852	1,683	6,693	3,886	14,886
OTHER		176	240	991	583	2,611	110	137	632	390	1,757
Subtotal:-----		4,985	3,177	11,176	6,969	25,677	2,962	1,820	7,325	4,276	16,642
FZN POTATO(SEP)	MT										
CANADA		14,368	13,554	36,953	38,685	157,531	8,336	8,095	20,853	23,477	94,960
OTHER		33	3	87	27	300	28	9	96	48	394
Subtotal:-----		14,401	13,557	37,040	38,712	157,832	8,364	8,104	20,949	23,525	95,354
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
TURKEY		0	30	4	135	68	0	78	7	351	210
CHINA, PEOPLES R		0	0	0	0	68	0	0	0	0	112
OTHER		0	0	0	8	2	0	0	0	12	8
Subtotal:-----		0	30	4	143	138	0	78	7	363	330
CASHEW NUT(AUG)	MT										
INDIA		2,298	2,117	13,631	10,166	31,403	9,832	10,677	59,690	48,226	136,022
BRAZIL		1,641	1,837	5,762	7,022	22,358	8,037	9,248	26,944	34,538	100,544
OTHER		337	405	1,457	1,669	2,995	1,441	1,986	6,417	7,624	12,754
Subtotal:-----		4,276	4,359	20,851	18,855	56,757	19,310	21,911	93,051	90,388	249,321
FILBERTS(AUG)	MT										
TURKEY		427	396	889	1,762	5,910	1,574	1,514	3,278	6,444	21,149
OTHER		83	166	152	543	247	239	213	415	683	812
Subtotal:-----		510	563	1,041	2,306	6,157	1,813	1,727	3,693	7,127	21,961
PECANS NSH(SEP)	MT										
MEXICO		5,959	4,665	7,707	6,665	19,219	11,246	7,330	13,840	9,874	37,949
OTHER		0	0	41	0	41	0	0	68	0	68
Subtotal:-----		5,959	4,665	7,748	6,665	19,260	11,246	7,330	13,908	9,874	38,016
WINES											
CHMP&SPRK WN(JAN)	KL										
EU_15		5,060	5,276	26,852	27,859	29,631	41,277	48,422	247,066	268,757	269,026
FRANCE		1,594	1,651	9,463	9,204	10,246	26,763	32,204	172,019	186,856	185,494
ITALY		1,825	1,944	10,391	10,649	11,131	7,919	9,239	46,182	48,553	49,372
OTHER		85	61	340	256	364	322	223	1,040	967	1,150
Subtotal:-----		5,146	5,337	27,192	28,116	29,995	41,599	48,645	248,106	269,724	270,176
FT&VERM WN(JAN)	KL										
EU_15		1,384	1,112	13,191	12,524	14,201	6,155	4,825	52,595	54,717	56,651
ITALY		691	563	7,521	6,834	8,087	1,809	1,301	18,424	16,661	19,802
PORTUGAL		188	164	1,461	1,641	1,615	2,118	1,651	15,130	17,240	16,685
SPAIN		450	279	3,456	3,167	3,667	1,831	1,055	15,497	15,489	16,223
OTHER		39	48	190	352	215	139	218	809	1,464	911
Subtotal:-----		1,424	1,160	13,381	12,875	14,417	6,295	5,043	53,404	56,181	57,562
OTH GP WINE(JAN)	KL										
EU_15		18,921	18,751	159,838	163,974	173,380	70,227	76,083	537,265	608,254	585,926
FRANCE		7,707	7,654	53,509	55,817	58,150	41,460	44,342	270,077	313,324	293,182
ITALY		8,858	8,627	84,778	87,216	91,466	21,191	23,252	204,718	224,644	223,717
OTHER		3,839	5,144	42,528	46,342	46,145	10,626	12,530	101,061	117,146	110,741
Subtotal:-----		22,760	23,895	202,375	210,316	219,533	80,853	88,613	638,338	725,401	696,680
OTH WN PROD(JAN)	KL										
EU_15		655	605	4,463	4,785	4,771	952	627	6,138	6,390	6,612
JAPAN		105	170	1,473	1,512	1,598	514	880	5,645	7,076	6,210
CANADA		102	63	3,125	785	3,301	98	32	4,122	534	4,303
UNITED KINGDOM		369	246	2,294	2,533	2,489	556	242	3,096	3,140	3,392
OTHER		77	58	948	958	1,018	129	147	1,829	1,984	2,003
Subtotal:-----		938	897	10,010	8,040	10,689	1,693	1,686	17,734	15,984	19,127
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	5,331	6,774	86,736	92,688	90,891
OTHER		0	0	0	0	0	2,721	3,613	32,332	48,994	34,773
Subtotal:-----		0	0	0	0	0	8,051	10,387	119,068	141,682	125,664
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	8,302	10,469	78,832	98,967	88,240
OTHER		0	0	0	0	0	160	288	2,150	3,569	2,408
Subtotal:-----		0	0	0	0	0	8,462	10,757	80,982	102,536	90,648

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